

The background of the slide is a vintage map with a compass rose and a pair of dividers. The map is slightly faded and has a warm, aged tone. The compass rose is in the upper left, and the dividers are in the lower right. The text is overlaid on the map.

# *Vision - Map*

## *Project Management*

### **Methodology**

**Release 2.0**

**Strategy1**

Consulting

# *Vision-Map*

## *Project Management Methodology*

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# *Vision-Map*

## *Project Management Methodology*

### *Vision-Map Overview*

- *Vision-Map is a series of interrelated methodologies, tools, and techniques that provide a structured framework for successfully completing business initiatives and information technology (IT) projects.*
  
- *Vision-Map focuses in seven key areas:*
  - *Strategic Business & IS Planning*
  - *Business Continuity & IT Disaster Recovery*
  - *IT Assessments*
  - *Requirements Definition & Solution Selection*
  - *Systems Development*
  - *Business Performance Improvement*
  - *Sarbanes-Oxley Compliance*
  - *Project Management*
  
- *Key Vision-Map objectives include:*
  - *Providing a consistent and stable approach to managing projects*
  - *Maximizing project team knowledge in the use, and control of available resources*
  - *Focusing projects by aligning business and IS initiatives with company business goals and objectives*
  - *Increasing the quality of business and IS projects through the use of time-tested, repeatable and rigorous methods and techniques*
  - *Reducing the overall costs of business and IS project life cycles*
  
- *Vision-Map integrates today's best business and IT management practices with state-of-the-art tools and techniques into methodologies that offer consistency, flexibility, and the ability to evolve as business and IT knowledge and environments expand and transform.*

# *Vision-Map*

## *Project Management Methodology*

### *Project Management*

#### **Executive Summary**

##### Overview

Vision-Map's Project Management Methodology provides project managers with a consistent and standardized set of project management processes and approaches by which to structure, plan, and manage information system (IS) projects.

##### What is a Project?

Definition:

***Project** - A related group of work activities, organized under the direction of a project manager, which when carried out will achieve certain objectives. A project has a stated scope; identified deliverables and work steps; and an established budget and duration, all of which are defined in the project charter. Examples are business process improvement projects, strategic information systems planning projects, and applications development projects.*

A project:

- Has a beginning and an end;
- Is defined by specific objectives;
- Is conducted by a well-defined organization;
- Has a single project manager who is responsible for its success; and
- Is defined by identifying the starting point and the goal and the route between them.

Most projects represent a significant investment. To protect that investment, projects must be planned and controlled. All successful projects move forward in a controlled manner from their beginning to their conclusion.

Projects consume resources. This includes the efforts of the project team along with additional resources such as computer support and the funds for project-related travel and training. These resources must be used productively and effectively or their associated projects will be late and/or over budget.

# *Vision-Map*

## *Project Management Methodology*

### **Executive Summary (cont.)**

Project deliverables are developed to show tangible results and to provide substance for quality reviews. An overall approach to quality must be planned and incorporated into the project plan to ensure that project outputs are acceptable and support the business need.

Risk and uncertainty are associated with all projects. Risk mitigation strategies are key elements in ensuring that project objectives are successfully achieved. As such, risk management plans that anticipate and minimize project risk must also be developed and incorporated into overall project plans and monitored throughout the project life cycle.

#### What is Project Management?

Definition:

***Project Management*** - *The process by which a project is initiated, controlled, and brought to a successful conclusion.*

The objective of project management is to plan and control projects from initiation to conclusion. Its goal is to continuously maintain high levels of productivity and quality while minimizing levels of risk and uncertainty.

Project management is executed in many ways and at many levels. A project must be managed in terms of structure, work performed, quality of deliverables, and team productivity. Levels of monitoring and control can vary and occur on an hourly, weekly, or monthly basis. Project progress is reported to audience levels varying from senior management to project team members.

A properly designed project does not exist in isolation, but in an authorizing and controlling framework for which the project manager is accountable. The exact form and component parts of this management and control structure may vary from organization to organization and from project to project.

#### Project Management Processes

As shown in Exhibit 1 (*Page 5*), the project management life cycle consists of six (6) major processes:

1. Project Definition
2. Project Planning

# Vision-Map

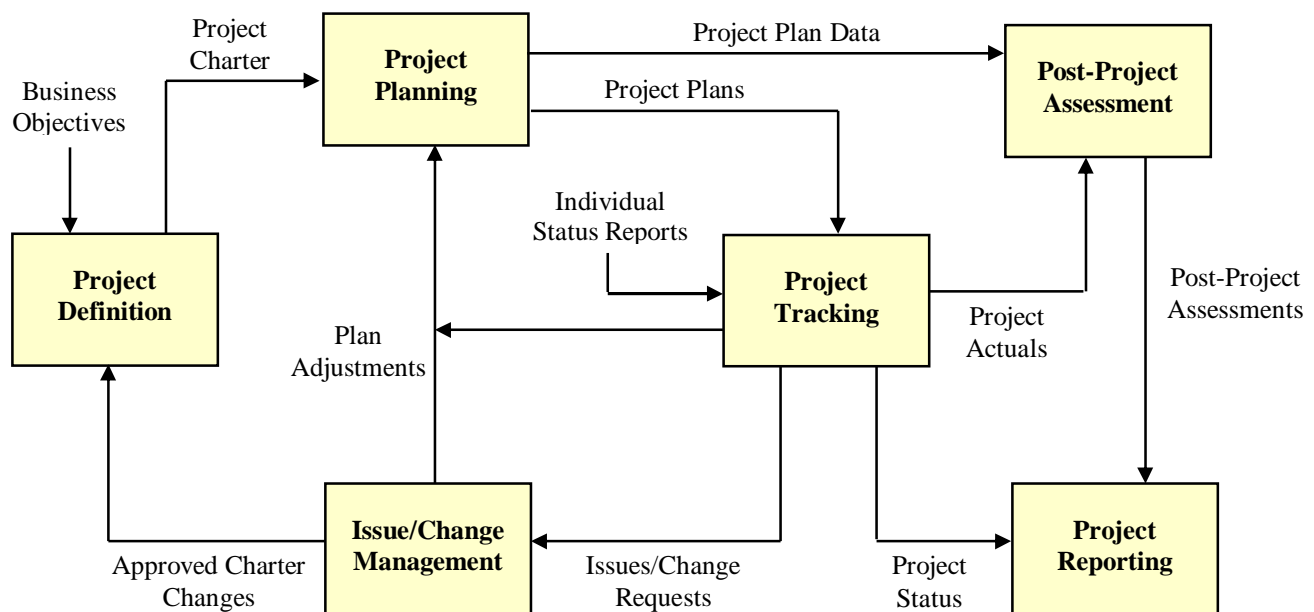
## Project Management Methodology

### Executive Summary (cont.)

3. Project Tracking
4. Project Reporting
5. Issue/Change Management
6. Post-Project Assessment

Vision-Map represents the elements of the project management life cycle as processes because project management is a series of visible, repeatable, predictable, and measurable activities that can be continuously improved upon. Using the process framework also allows for the discussion of the sequential actions within project management and accommodates the cyclical, periodic, and event-driven aspects of a project.

*Exhibit 1 - The Project Management Life Cycle*



# *Vision-Map*

## *Project Management Methodology*

### **Executive Summary (cont.)**

#### *Key Principles of Vision-Map's Project Management Methodology*

The following key principles are fundamental to the effective use of Vision-Map's Project Management Methodology:

- ❑ Projects are typically three to nine months in duration with no more than seven dedicated team members (including the project manager). Projects exceeding these parameters may be partitioned into phases that may be managed individually as separate sub-projects.
- ❑ Projects are to be based on business need and focused on specific business objectives.
- ❑ Project deliverables are the basis for defining work, measuring quality and tracking progress.
- ❑ Project priorities and investment decisions are managed through the use of detailed master project plans.
- ❑ Each project may create one or more successive projects that build upon and refine its work.
- ❑ Project estimates can be made at various levels, but are always based on heuristics associated with things that are known or easily predicted.
- ❑ Project resource productivity is leveraged through the use of common methods, tools and techniques, and the reuse of knowledge gained from previous projects.
- ❑ Project success is significantly jeopardized by the failure to utilize a structured approach to project management. Most aspects of a project can be readily planned and estimated. However, the management and control of unplanned project events are key to the ongoing success of the project and minimized by Vision-Map's approach to project management.

The following section, Project Management Processes, provides summaries of the six major project management processes. Each summary includes a general overview of the process, process objectives and approach, and identifies process aides and deliverables.

Additionally, for your reference, the attached Appendices provide templates for completing project worksheets and deliverables; examples of project management-related work products; and a reference section that includes project risk management strategies.

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes**

#### **Project Definition**

##### *Process Overview*

The purpose of the Project Definition process is to formally define and document the project's scope, objectives, approach, and control mechanisms. As part of this process, high level estimates of the project's effort, duration, and cost are developed along with key quality, risk, and scope management concerns.

##### *Process Objective*

To develop an initial definition of the project

##### *Process Approach*

1. Identify business objectives supported by the project.

With the project sponsor, define the corporate business goals and objectives that will be supported by the project.

2. Define the project's scope.

Clearly define the scope of the project in terms of geographical location, functional business areas and/or IS applications involved, deliverables expected, anticipated costs, and targeted start and end dates.

3. Determine the project's objectives.

Within the defined scope of the project, identify the specific objectives to be accomplished by the project.

4. Establish the project's management and reporting structure.

Establish the project's organization structure by defining project team members, roles and responsibilities, levels of authority, and reporting relationships.

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Project Definition (cont.)**

5. Define major project deliverables.

Define the work products necessary to satisfy the objectives of the project.

6. Develop the project's approach.

Develop a high-level description of each phase, stage, activity, task, and work step needed to produce project deliverables of the project. The project approach should also identify how project quality, risk and issue management and change control will be addressed over the course of the project.

7. Develop order of magnitude resource, time, and cost estimates.

Based on the project approach, develop high-level resource, time, and cost estimates for the completion of project tasks and work steps.

8. Develop a high-level project plan.

Incorporating the project approach and order of magnitude resource, and time estimates, develop a high-level project plan. At the activity level, define timelines for high-level project plans expressed in terms of elapsed weeks or months.

9. Perform risk assessments.

Perform a risk assessment to systematically identify the anticipated risk factors associated with the project. This risk assessment will serve as the basis for developing project risk mitigation/management strategies defined in the Project Planning process.

10. Define quality metrics and process measurements.

With the project sponsor, define the metrics and process measurements that will be used to ensure customer satisfaction throughout the project life cycle.

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Project Definition (cont.)**

11. Develop project charter.

Used to formally define the agreement between the project sponsor and the project manager, develop a document that clearly defines the project's scope, objectives, approach, assumptions, roles and responsibilities, and deliverables.

#### *Process Aids*

- Business Goals and Objectives Worksheet
- Project Goals and Objectives Worksheet
- Risk Assessment Questionnaire
- Project Role and Responsibility Worksheet
- Project Workplan Definition Worksheet

#### *Process Deliverable*

- Project Charter\*

\* *Note* - Dependent on project size, an approved Letter of Understanding, Statement of Work, or Customer Focused Goal statement may be acceptable alternatives.

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Project Planning**

##### *Process Overview*

The purpose of the Project Planning process is to develop and gain consensus on project plans and budgets and to assign project resources. This process also includes developing project related risk management, quality assurance, and change control plans.

##### *Process Objective*

To develop project plans consistent with the project charter

##### *Process Approach*

1. Validate project charter.

With the project sponsor, re-validate the project's scope, objectives and strategies as defined in the project's charter.

2. Refine the work components necessary to satisfy project objectives.

Refine the tasks, activities, work steps and deliverables needed to satisfy the business objectives of the project.

3. Estimate the work effort necessary to complete the work components.

Develop detail level estimates of the projected work efforts required to complete the activities, tasks and work steps associated with the project

4. Document project assumptions and constraints.

Identify and document any assumptions and/or constraints associated with the project

5. Develop a detailed project work plan and assign project resources.

At the task level, develop a work plan that details the worksteps, timelines, and resource requirements of the project.

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Project Planning (cont.)**

6. Finalize project budgets.

Based on the detailed project plans, review initial high-level budgets and adjust as appropriate. Obtain project sponsor approval for all variances. Finalize the project budget.

7. Develop project-related quality assurance plans.

Review the detailed project plan and develop a detailed quality assurance plan that identifies the exact points in the project when quality reviews will occur and the project resources that will be involved

8. Develop project-related risk management plans.

Review the detailed project plan and the risk assessment prepared in the Project Definition process. Prepare a risk mitigation/management plan for dealing with existing or anticipated risk

9. Define project-related change control and issue resolution strategies.

Define and document the change control and issue resolution processes that will be followed during the project life cycle. Distribute to all project-team members.

10. Obtain client approval on project plans.

Gain project sponsor approval on all project plans, resource commitments, and budgets.

#### **Process Deliverables**

- Validated Project Charter
- Detailed Project Work Plans
- Finalized Project Budgets
- Approved Risk Management Plan
- Approved Quality Assurance Plan
- Approved Change Control and Issue Resolution Plans

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Project Tracking**

##### *Process Overview*

The purpose of the Project Tracking process is to track and evaluate progress against project plans in terms of cost, quality, and timing. Then, based on this evaluation, to recommend and/or take corrective action to resolve issues resulting from plan deviations.

##### *Process Objective*

To manage and control project performance

##### *Process Approach*

1. Track project progress against project plans and budget.

Monitor project progress comparing project actuals to plan progress and costs.

2. Identify project plan deviations, risks, and overruns.

Analyze project-tracking data and identify project plan deviations, potential new risk factors, and cost overruns. Additionally, identify and continuously monitor trends in performance by individuals or groups of individuals.

3. Assess need for corrective action.

Evaluate the anticipated impact that identified project deviations, risk factors, or overruns may have on the project plan and/or project charter. Identified problems may or may not require corrective action. To avoid allowing situations to deteriorate to the point where the project charter is compromised, it is however, vital identify problems and initiate corrective actions early.

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Project Tracking (cont.)**

4. Recommend/take corrective actions.

As appropriate, recommend corrective actions to the project steering and/or executive committees. Possible corrective actions may include project plan adjustments, resource adjustments, budget adjustments, and, in severe cases, the project charter. All corrective actions are to be made with the knowledge and approval of the project sponsor.

5. Maintain project control file.

Maintain currency of project control file by archiving project-related documentation including individual and management project status reports, deliverable approval forms, project change request forms, and issue notification forms.

#### *Process Deliverables*

- Variance Update Report
- Project Control File

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Project Reporting**

##### *Process Overview*

The purpose of Project Reporting process is to report project progress against the project charter in terms of planned objectives and deliverables. Reporting should take place at a frequency appropriate to the nature and circumstances of the project and at a level of detail appropriate to the target audience.

##### *Process Objective*

To accurately and concisely communicate project progress against project plans

##### *Process Approach*

1. Establish project status reporting processes.

Define project-related reporting requirements including:

- Audiences
- Level of detail
- Content
- Format
- Media
- Frequency

2. Report progress towards project plan objectives.

Synthesize and summarize individual status report information. Prepare appropriate management reports summarizing and evaluating project team progress against the detailed project work plan.

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Project Reporting (cont.)**

3. Prepare project progress reports.

Based on information gathered during Project Tracking, complete project status reports, stage result summaries, exception reports, and project completion approval reports to effectively communicate project progress as measured against project charter criteria. Where possible, the project manager should, prior to distribution, review the content of progress reports to verify the completeness and accuracy of the report and minimize confusion over the content of the reports.

4. Distribute project status-related reports.

Distribute project status-related reports to the appropriate parties including the project control file.

5. Maintain project control file.

Maintain currency of project control file by archiving project status-related documentation including individual and management project status reports, deliverable status forms, project change request forms, and issue notification forms.

#### *Process Deliverables*

- Project Team Member Status Report
- Project Management (Steering Committee) Status Report
- Project Deliverable Status Report
- Project Issue/Issue Resolution Report

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Issue/Change Management**

##### *Process Overview*

The Issue/Change Management process provides a mechanism for documenting, evaluating, and recording the disposition of project-related issues and change requests. Project managers must recognize that change naturally occurs within the project life cycle. Likewise, few IS projects are completed without the advent of project-related issues. The key is not attempting to stop issues and change from occurring, but rather to effectively manage and control project-related issues and change requests in support of the project charter. A well-organized issue/change management process is essential to the preservation of the project charter.

##### *Process Objective*

To provide a single control point for the formal documentation, evaluation and disposition of project-related issues and internally and externally generated project change requests.

##### *Process Approach*

1. Document project-related issues and internally and externally generated project change requests.

Record project-related issues and change requests using the Issue Notification and Project Change Request forms. Issue notifications and project change requests may be internally (by project team members) or externally (by non-project team members) generated. Submitted to the project manager for evaluation and disposition, issue notification and project change requests become part of the project control file.

2. Evaluate formally documented project-related issues and change requests.

Utilizing information provided on the issue notification and project change request forms, assess whether an identified issue or change request merits further investigation. If so, evaluate the necessity/criticality and priority of the issue or requested change and assess the issue and change request's impact on the project's resources, schedule and budget.

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Issue/Change Management (cont.)**

3. Dispose of project-related issues and change requests.

After completing an objective analysis of the need to resolve a project-related issue or to implement a project change request, formally approve, defer (pending further investigation), or reject the resolution/implementation of the identified issue or change request.

4. Maintain project control file and, as appropriate, update the project charter.

Maintain currency of project control file by archiving project-related issue and change request documentation. With project sponsor approval, update the project charter to reflect all project change requests approved for implementation.

#### *Process Deliverables*

- Issue Notification Form
- Issue Resolution Log
- Change Request Form
- Change Request Log
- Project Control
- Updated Project Charter

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Post-Project Assessment**

##### *Process Overview*

The Post-Project Assessment process is the action of closing out the project management life cycle. It occurs only after members of the project's management team, control structure, and sponsor have agreed that the project has been successfully completed or is to be terminated. Projects are successfully completed when project objectives, as outlined in the project charter, have been achieved. Recognizing that not all projects are successful, projects may also be formally terminated, for whatever reasons, by Strategy1, the project's sponsor or control structure. As part of this process, the project is formally concluded and the project and its resources are formally evaluated. As such, this process occurs only once during the project management life cycle.

##### *Process Objectives*

- To identify, confirm, and communicate the conclusion/termination of the project
- To evaluate the project and project resources
- To record key project details for reference in the planning and execution of future projects
- To provide feedback to the project's management team, control structure, and project team

##### *Process Approach*

1. Identify the conclusion/termination of the project.

Formally document the conclusion or termination of the project.

2. Verify project results against the project charter.

As part of the formal documentation concluding or terminating the project, validate/assess the results of the project against the goals and objectives identified in the project charter.

3. Report results to project team, sponsor, and control structure.

As appropriate, distribute the documentation formally concluding or terminating the project to project team members and the project's sponsor and control structure.

# *Vision-Map*

## *Project Management Methodology*

### **Project Management Processes (cont.)**

#### **Post-Project Assessment (cont.)**

4. Formally evaluate project team members.

As requested, evaluate and provide feedback on the performance of all Strategy1 project team members.

5. Record key project details for future project planning and execution and add to Strategy1's historical project database.
6. Complete a Strategy1 Engagement Profile and add key project details to Strategy1's historical project database for future project planning and execution reference.

#### *Process Deliverables*

- Project Conclusion Approval Form
- Final Project Assessment Report
- Project Team Member Evaluations
- Strategy1 Engagement Profile
- Updated Strategy1 Historical Project Database

*Vision-Map*  
*Project Management Methodology*

**APPENDICES**