

# PROJECT MANAGEMENT HANDBOOK

## Version 1.0

Project Management is a mindset, not a software package. It is about being really clear what success looks like and what are the key stages that need to happen in order to get there.

It is about being able to map out the total picture and run with it with discipline and focus. Without it, work may slip, mistakes are more likely, money can be wasted, the end product can be flawed and people can become frustrated.

<b>CONTENTS</b>	<b>PAGE</b>
<b>INTRODUCTION</b>	<b>3</b>
<b>PURPOSE</b>	<b>4</b>
<b>PROJECT INITIATION</b>	<b>5</b>
<b>PROJECT PLANNING</b>	<b>12</b>
<b>PROJECT CONTROL</b>	<b>17</b>
<b>PROJECT REVIEW</b>	<b>19</b>
<b>APPENDIX A</b>	<b>21</b>

## INTRODUCTION

I have written this handbook for you because of the benefits that project management can bring to you, to your customers and to your organisation.

The information provided in this handbook builds on the Changescape Project Management training you have received and provides some handy hints and tips in order that you can get your project management disciplines established early on. If you are to demonstrate the commercial as well as professional benefits of your projects, the approaches described here are a vital component of your tool kit.

You should not adopt a regimented or inflexible bureaucracy in your approach to projects - it is important that you retain as much individual creativity as possible when offering solutions to your customers. The focus of this handbook is one of providing techniques and advice on best practice and you should strive to ensure that you continually monitor and improve over time. You have a vested interest in reviewing how you develop your project management skills on a formal and informal basis.

Experience proves that the route to success through project management is one of clear accountability and ownership. You need to demonstrate your readiness to tackle key issues and deliver high quality outputs in partnership with your customers in a planned and focused way.

I hope that over the next few months, the pages of this handbook are well thumbed and add value for you so that you can meet the challenges presented by your project oriented role.

A handwritten signature in black ink that reads "Gary Homes". The signature is written in a cursive, flowing style with a large initial 'G'.

Gary Homes  
Managing Director  
Changescape Limited

## **PURPOSE**

Most people in business today find themselves involved in project work in some form or another. Many elements of our working lives that we take for granted or consider as our normal business processes are, in fact, mini projects and all of our work can be made easier through the adoption of some simple project management best practice.

The purpose of this handbook is to summarise the responsibilities of those involved in project work and to provide the framework to link together the phases used to implement projects i.e.

**Project Initiation**

**Project Planning**

**Project Control**

**Post Project Review**

This handbook should not be seen as describing the definitive approach on how to manage projects. Rather it should be viewed as a route map to assist you through a journey. Each turn and each junction requires decisions to determine the best route for any given project. Therefore, this handbook should be used as a guide and the concepts within these pages should be tuned to fit specific projects. However, the principles herein, based on best practice, pertain to all projects - hence it is the way the principles are applied which is tuned, not the principles themselves.

**Use this handbook as a coach to help you tackle each future project you become involved with.**

## PROJECT INITIATION

The need or idea for a project is born out of someone having a business requirement or spotting a business opportunity but the project can't really start until a proper initiation has taken place. To get a project off to the right start, good quality Terms of Reference are essential. These define why the project is needed, what the project must achieve and within what limits the project must operate.

### DEFINING TERMS OF REFERENCE

It is essential to have a common framework for the Project Terms of Reference. The Project Planner, as the first stage of describing the project more fully, produces Terms of Reference. The BOSCARD approach is a useful guide on what to include:

**Background** – Describe the circumstances that have led to this project being required. Explain the business rationale, why the project is being done and why now. Be sure this section indicates the relative priority of this project in relation to other projects and business activities. This section gives the “big picture” and puts the project into context.

**Objectives** – This section specifies what needs to be achieved and should include:

- The overall business objectives
- The specific project objectives
- How the objectives will be measured
- When the objectives will be measured

Project objectives should be worded in the following style: “To define management training needs of all management grade staff in the IT department. This objective will be measured by a Training Needs Analysis report being approved and signed off by the IT Director by August 31st 2000.”

Make sure you distinguish between the Business Objectives (why you are conducting the project) and the Project Objectives (how you are going to conduct the project) and for each, ensure you produce SMART objectives:

- ✍ Specific
- ✍ Measurable
- ✍ Agreed
- ✍ Realistic
- ✍ Time bound

**Scope** – This section describes are the business boundaries and limits of the project. This should refer to the following areas:

- ✍ Departments
- ✍ Business Functions
- ✍ Business Processes
- ✍ Geographical Locations
- ✍ Job Roles
- ✍ Job Grades
- ✍ Stakeholders
- ✍ Project Interfaces

It is important to specify the exclusions as well as the inclusions.

**Constraints** – This section describes any limiting factors and the limits of authority of the Project manager. Typical constraints include:

- ✍ Time
- ✍ Money
- ✍ People
- ✍ Other resources
- ✍ Hardware
- ✍ Software
- ✍ Standards

**Assumptions** – These section lists assumptions made by the project manager for planning purposes and records any missing information to which answers have been assumed in order to make some form of progress. As the assumptions are verified, they would typically then move to the appropriate section within the TOR.

**Reporting** – This section describes the reporting lines and organisational structure of the project, detailing who fulfils what role and defines the responsibilities of each role in the project. This should be represented as an organisation diagram with supporting text for responsibilities. See the section on Roles & Responsibilities below for more detailed information. It also sets out how people will be kept informed of the progress of the project and should detail:

- ✍ When progress reporting will occur and at what levels
- ✍ Who is responsible for reporting what to whom
- ✍ What format reporting will take
- ✍ What the procedures are for exception reporting / problem escalation

**Deliverables** - This section describes what primary deliverables are to be in existence at the end of the project. It should explain what format these key deliverables should be in and how they will be verified and accepted (signed-off). It should fully explain any standards the deliverables should conform to.

## ESTABLISHING ROLES AND RESPONSIBILITIES

While it is possible for a project to be conducted with one person fulfilling all of the required roles, it is more common to see two or more people involved in some way or another. Your responsibility is to define who needs to contribute to your project and in what capacity. Failing to do this will create confusion, waste time and run the risk of the ball being dropped. Therefore, clarification of the project roles and responsibilities is one of the critical success factors of any project. Examples of the typical project roles are listed below. Only the major responsibilities for each role are described here. Some roles are optional and others are mandatory and some roles may be carried out by the same person. Please refer to appendix A for a full list of responsibilities for each role.

**Steering Group (Optional role)** - A Steering Group is responsible for the overall strategic direction of a project. Led by the Sponsor, the Steering Group ratifies project consistency with the business plan and, in overall terms, ensures the project is in line with the business strategy. It is recommended that the sponsor and representatives from the key stakeholder areas form the steering group.

**Project Sponsor (Mandatory role)** - Typically, this would be a Senior Manager from the business area most impacted by the project. The sponsor provides the business backing and is responsible for the delivery of the business objectives. Beware of the potential confusion over the sponsor and the key users who may believe they are also your sponsors. Recognise that sponsorship requires time & commitment.

**Project Manager (Mandatory role)** - The project manager runs the project on a day-to-day basis and is responsible for the delivery of the project objectives to time and within budget.

**Project Team (Mandatory role)** - This could be only the project manager on a small project or could be a large, multi-disciplined team representing many company functions on a large project.

**Project Support (Optional role)** - This can be provided in many forms: Assistance with resource allocation and tracking; Documentary backup; Quality reviews and administrative support to the project.

The following table gives a guideline for the key responsibilities for the primary project roles:

<b>Role Stage</b>	<b>Sponsor</b>	<b>Project Manager (PM)</b>	<b>Project Team</b>	<b>Project Support</b>
Initiate	<ul style="list-style-type: none"> <li>? Communicate a vision</li> <li>? Show commitment</li> <li>? Sell the project in the wider company</li> <li>? Support the PM</li> </ul>	<ul style="list-style-type: none"> <li>? Produce &amp; agree the TOR</li> <li>? Identify resource needs</li> <li>? Brief the team</li> </ul>	<ul style="list-style-type: none"> <li>? Attend briefing</li> <li>? Support the PM</li> </ul>	<ul style="list-style-type: none"> <li>? Identify potential PD/PM</li> <li>? Store TOR's</li> <li>? Provide admin. support to sponsor, &amp; PM</li> </ul>
Plan	<ul style="list-style-type: none"> <li>? Communicate the priority</li> <li>? Agree schedule &amp; budget</li> <li>? Make resources available</li> <li>? Encourage &amp; support the PM</li> </ul>	<ul style="list-style-type: none"> <li>? Produce project schedule &amp; budget</li> <li>? Communicate priorities to team</li> <li>? Allocate work to team</li> </ul>	<ul style="list-style-type: none"> <li>? Input to project schedule</li> <li>? Develop contingency plans</li> </ul>	<ul style="list-style-type: none"> <li>? Schedule resources</li> <li>? Negotiate resources</li> <li>? Maintain overall resource plan</li> </ul>
Control	<ul style="list-style-type: none"> <li>? Give business direction</li> <li>? Control change to the plan</li> <li>? Resolve conflict with stakeholders</li> <li>? Communicate progress to stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>? Monitor project progress</li> <li>? Keep sponsor informed</li> <li>? Control change</li> <li>? Support the team</li> </ul>	<ul style="list-style-type: none"> <li>? Work as per schedule</li> <li>? Report progress to PM</li> <li>? Spot opportunities to improve</li> <li>? Identify conflicts</li> </ul>	<ul style="list-style-type: none"> <li>? Track resource usage vs. plan</li> <li>? Identify resource conflicts</li> <li>? Communicate to the 'team'</li> <li>? Maintain project files</li> </ul>
Review	<ul style="list-style-type: none"> <li>? Ensure review done</li> <li>? Formally close</li> <li>? Monitor benefits</li> <li>? Provide 360° feedback</li> <li>? Learn from it</li> </ul>	<ul style="list-style-type: none"> <li>? Conduct the review</li> <li>? Communicate results</li> <li>? Recognise &amp; reward</li> <li>? Provide 360° feedback</li> <li>? Learn from it</li> </ul>	<ul style="list-style-type: none"> <li>? Support the review</li> <li>? Contribute to 360° feedback</li> <li>? Learn from it</li> </ul>	<ul style="list-style-type: none"> <li>? Close resource allocation</li> <li>? Maintain statistics</li> <li>? Maintain project library</li> <li>? Communicate results</li> <li>? Give feedback</li> <li>? Learn from it</li> </ul>

The roles and responsibilities above are described from a project perspective and not from line reporting one.

There may be a variety of reporting lines within any given project. The responsibility matrix example below (known as a SCARI Matrix) provides a useful tool for defining the specific project roles and the relationships between them. The matrix for each project will be different and the one below is intended to illustrate the technique rather than be taken as a standard model.

### RESPONSIBILITY MATRIX

Responsibility	Project Sponsor	Project Manager	Key Users	Steering Group	Project Team
Create TOR	A / S	R	C / I	C	I
Agree budget	A / R	I	I	C / I	I
Produce plans	C / I	A / R	C / I	C / S	I
Analyse needs		A	C	I	R
Define options	I	A	C	I	R
Agree solution	S	A / R	C	I	I
Develop solution	C / I	A	C / I	I	R
Test solution	I	A	R	I	R
Implement solution	S	A	R	I	R
Review project	I / S	A / R	C / I	C / I	C / I

**Key:**

- S** = **SIGN-OFF** (the person who authorises)
- C** = **CONSULT** (person(s) consulted during the life of the job)
- A** = **ACCOUNTABLE** (the person who sees the job gets done)
- R** = **RESPONSIBLE** (the person(s) who actually do(es) the job)
- I** = **INFORM** (person(s) informed of the outcome of the job)

### Using the Matrix

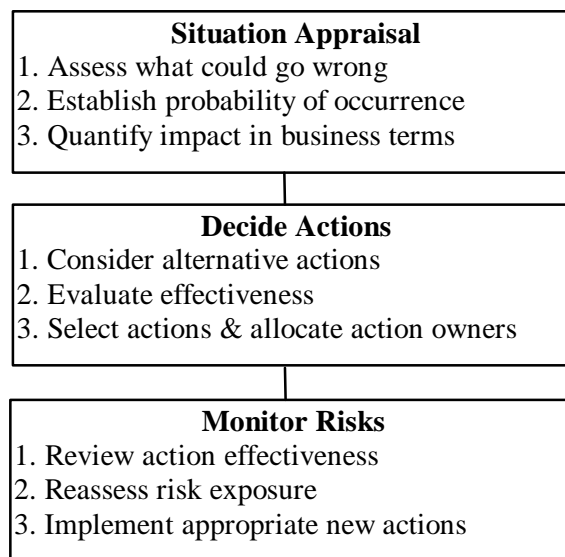
- ? Only ever one "S" appearing against a job but not always necessary
- ? Optional use of "C" - best kept to a minimum if possible
- ? Only ever one "A" appearing against a job & always one "A"
- ? At least one "R" against every job but maybe more than one "R"
- ? Optional use of "I" - best kept to a minimum if possible

## RISK ANALYSIS & RISK MANAGEMENT

Project managers are required to identify the risks to their projects, quantify the impacts of those risks and determine the actions required to mitigate them. The risks should be reviewed at least once during each stage of the project, as the work gets carried out. Risk management is not a once-off process - it must be repeated regularly throughout the project. At each review period, the Project manager should review the risks with the project team for any changes as part of the project re-assessment and the risk management plan update. Generally, success is measured in terms of:

- ? delivering a good quality product
- ? being on schedule
- ? staying within budget

The general risk management process is as follows:



## Risk Workshops

A particularly effective way of identifying risks and subsequent risk management actions is to hold a risk workshop. This involves getting the project team together and brain storming what could go wrong. For each risk identified, consider how likely it is to occur (highly likely, possible, not very likely). Then for each risk, quantify its business impact in terms of people, financial, image, other projects, and timescale. For high probability and high impact risks, brainstorm avoiding or containing actions, identify risk owners and risk review points. Repeat the process for the highly likely, medium impact then possible risk, high impact. Using flip chart, white boards and brown paper will help the group to visualise the situations. Get the output typed at the end of the workshop and use it as a basis for your risk management plan. Risk workshops can be repeated at any stage of the project.

**REMEMBER - Unmanaged risks can cause unexpected problems to occur which take us from proactively managed projects to crisis managed projects**

The table below gives an indication of the level of formality you may wish to use when starting a project:

Technique	Small Project	Medium Project	Large Project
Project Critical Success Factors	†	†	†
Terms of Reference (BOSCARD)	†	†	†
Definition of Roles & Responsibilities	†	†	†
Risk Management Plan	†	†	†
Definition of Project Methodology to be used		†	†
Definition of the Change Control Process		†	†
Communications Plan		†	†
Documentation on Interfaces of the Project			†
Training Requirements			†

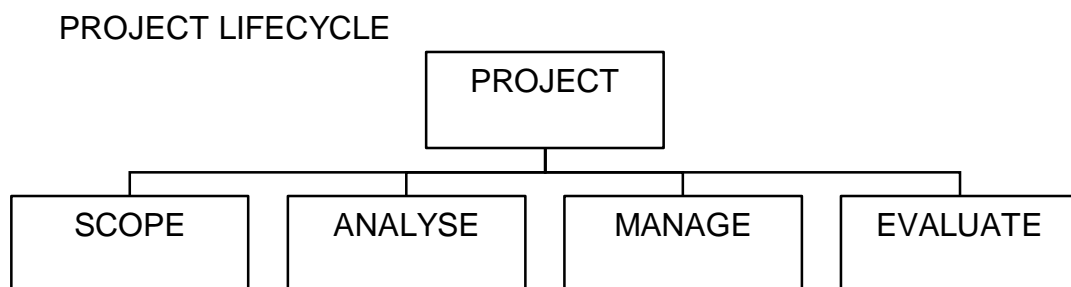
## PROJECT PLANNING

Projects should be approached in a common sense fashion (i.e. understand the project, understand the business requirements, build the solution, put the solution into place). If a logical approach is bypassed, unnecessary rework is created and the project will be run inefficiently. Whatever approach is used, it must be remembered that there is no standard approach to any given project. By their very nature, all projects are different and it is important to tailor your approach to the needs of the project and not vice versa.

A well-managed project would have the following characteristics:

- † A clear sponsor commissioning the work & tracking the benefits
- † An identified project manager accountable for the project
- † A unique plan with a schedule and targets for both costs and benefits

Though there are many logical approaches to projects (too many to list here), the following simple approach can be used very effectively to structure a training & development project.



**Scope:** Focus attention on why the project is needed, what the objectives are, what is to be included & excluded, what financial and time constraints exist, what the business risks are and how the project should be approached. The Scope stage is concluded with a Stage Review.

**Analyse:** Understand the current situation, what the required situation is to be, analyse the costs and benefits in detail and reaffirm how to progress the project further. The Analyse stage is concluded with a Stage Review.

**Manage:** Consider alternative approaches to provide the project deliverables and select the most suitable, create the main project deliverables and prepare to use them in the working environment. Put the project deliverables into place and create the working environment that enables the benefits to be realised. The Manage stage is concluded with a Stage Review.

**Evaluate:** The final stage is concerned with ensuring you learn from the experience and is concluded with a Post Project Review. It is essential to learn from what helped and hindered along the way so that future projects can benefit.

**All** projects must have a plan of some form. For a simple non-critical project with a single resource working on it, it would be acceptable to have a prioritised to-do list. As the project grows in size, complexity & risk, it becomes more important to use more formalised project-scheduling approaches and dependency networks/Gantt charts should be produced. The rest of this section defines the principles with which scheduling should be approached. When you have your plan, check it against the criteria below:

### Criteria for a Good Plan

- ? Linked to clear business objectives
- ? Flexible
- ? Realistic
- ? Adequate resources to achieve the plan
- ? Identified resources (who is required to do what)
- ? Skills required to do the work have been considered
- ? Capable of evaluation (factual)
- ? Time bound
- ? Comprehensive (understandable by all)
- ? Complete life cycle covered (detail for next stage of the project and high level for the rest of the project – using the 2-level planning approach)
- ? Agreed
- ? Completeness (no activities missing)
- ? Practical

### Work Break Down

In order to identify the steps involved in completing the project, it is advisable to take a top-down approach.

1. List the main stages you plan to go through (using a logical approach).
2. For the next stage (i.e. the one you are about to begin), list the main tasks involved (a good place to start is with the stage deliverables - what tasks are needed to produce them?).
3. Then for each task, identify what activities (units of work) are needed to complete the task.
4. Document the work breakdown as a table :

Stage/Task/Activity Name	Estimate	Dependency	Deliverable

**Handy Hint** - Each activity should conform to the following criteria:

- ? Clearly named with a verb & noun
- ? Performed by a single resource (usually)
- ? Produces one single deliverable component
- ? Reasonable timescale (half to 5 days as a guide)

For each stage after the one you are about to start, **do not** identify all the tasks & activities - simply identify the milestones to achieve project success. Later stages will be planned in detail as you approach them.

### Estimating

Consider using more than one approach to produce estimates and check them against each other for accuracy. For high level estimating, use techniques like Work Distribution Modelling and Standard Task Matrices. For detail estimating, use the Work Breakdown Structure and estimate for each activity. Use the Delphi technique when involving others in the estimating process. It is possible to produce statistical data on resource utilisation to aid the development of estimating models. The table below demonstrates the level of estimate each technique provides:

Level of estimate	High Level	Intermediate Level	Low Level
Technique			
Work Distribution Model	†		
Standard Task Matrix		†	
Work Breakdown Structure			†
Delphi	†	†	†

**Example of Standard Task Matrix (intermediate level) for producing Terms of Reference:**

PROJECT SIZE \ COMPLEXITY	SMALL	MEDIUM	BIG
<b>SIMPLE</b>	1/2 a day	1 day	1 & 1/2 days
<b>AVERAGE</b>	1 day	2 days	3 days
<b>COMPLEX</b>	2 days	4 days	5 days

SIZE = The number of functional areas involved in the project (1=small, 2-3=med, 3+=big)  
 COMPLEXITY = How new is this kind of work & how involved is it

**Handy Hint** - When producing detailed activity estimates, consider the following:

- ? Complexity of the job & the skills required
- ? Tools available to make the job easier
- ? The general working environment
- ? Specific interruptions that may occur
- ? Experience of the person who will do the job
- ? Attitude of the person who will do the job
- ? The availability of the person who will do the job (100%?)
- ? Have we done something similar before - how long did it take then?

It is important to get the buy-in from those who will perform the work. A good approach for this is to get the team together and facilitate a workshop where the work is identified and estimates produced. Estimating workshops can be run whenever an estimate is required. Use the Delphi technique to avoid “setting expectation” during the workshop.

### **Dependencies**

These fall into 3 categories:

#### **Mandatory inter-activity dependency**

An activity within the project that cannot possibly start until another activity within the same project has completed. **Example:** activity “Construct Training Programme” cannot possibly start until activity “Complete Training Needs Analysis” has finished.

#### **Optional Inter-activity dependency**

An activity within the project which could start at any time but which the project manager would prefer to undertake in a particular sequence. **Example:** activity “Advertise Course Contents” could be done at any stage after a course has been defined but it may be preferable to do it after activity “Agree Course schedule” has completed.

#### **Inter-project dependency**

An activity within a project that cannot possibly start until an activity within another project has completed. **Example:** A project to manage the year 2000 graduate intake could be split into 2 or more projects. One project is concerned solely with hiring the graduates and another project is concerned solely with inducting the graduates into the organisation. Activity “Send Induction Course Joining Instructions” in the second project cannot possibly start until activity “Receive Job Offer Acceptances” in the first project is complete as the names of those to send joining instructions to will not be known.

### **Dependency Checklist**

The Project manager must:

- ? Identify all dependencies prior to producing a project schedule
- ? Produce a project Critical Path Analysis for medium to large projects
- ? Assess individual activity risk for critical path activities
- ? Add contingency to cater for specific areas of uncertainty

## PROJECT CONTROL

### Progress Control & Reporting

It is the responsibility of the Project Manager to determine the frequency of control. Remember: *Don't leave review points for longer than you can afford to be behind schedule - Project Control is best done little & often.*

When checking progress, it is important to be able to quantify:

- ? What work has been done vs. what *should* have been done
- ? How long has it taken vs. how long *should* it have taken
- ? What has it cost vs. what *should* it have cost

When preparing to justify the progress made, consider:

- ? Why we are where we are
  - ? What problems have occurred & why
  - ? Have the resources been available
  - ? Has re-work been necessary
  - ? Were the estimates accurate
  - ? Were there any OSINTOT's  
(Oh s\*\*\*, I never thought of that!)
- ? Do I understand the *Real* situation

When looking at the impact, consider:

- ? Are we still working to the original objectives
- ? Does it impact timescale or budgets
- ? Does it impact resource usage
- ? Have the risks increased
- ? Does it impact other projects

Remember that sponsors will not like bad news but late bad news is unforgivable.

Report factually & don't hide behind lengthy progress reports.

## Change Control

Any changes during the life of a project may impact on the Project Manager's ability to deliver successfully. The most significant of changes are to:

- ? Project Sponsor
- ? Project manager
- ? Project Team
- ? Objectives
- ? Scope
- ? Deliverables
- ? Project Approach
- ? Time
- ? Money

For any change that comes along, a simple 5-step approach will help keep success within the Project Manager's grasp.

**Document the Change** - Identify who originated the change and write up as much detail on the degree of the change as you can.

**Justify the Change** - Get the instigator of the change to provide a detailed rationale as to why the change is seen as necessary to the project - also, get them to consider how they could cope without the change.

**Assess the impact** - Look at the project schedule and budget and consider how the change could be accommodated with minimum impact. Look at alternative approaches to accommodating the change. Whatever impact does exist, ensure it is fully quantified and is justifiable.

**Recommend** - Based on the above 3 points, go to the sponsor with a firm recommendation which could be any of the 3 points following: Reject the change completely; Put the change on hold - do as a subsequent project/phase; Accept the change & all its implications

**Decide & communicate** - The sponsor decides and the Project Manager communicates the change to all those who need to know about it.

Update the TOR with any changes agreed & store in the Project File.

## PROJECT REVIEW

All the approvals for the project deliverables should be obtained prior to project close down. Only the sponsor can formally close down any project. Final sign-off occurs after all deliverables are handed over and all reviews are complete.

Large Projects should be reviewed at the end of each stage. At the end of a project, every project, no matter how small or how successful should go through a final review. The intent of the review is to consolidate learning from the stage reviews, capture essential project statistics and to learn from the experience so that future projects may benefit and the project management process may be continually improved. Three key things must be reviewed:

- ? Project management method
- ? Techniques & tools used to support the project
- ? Deliverables produced by the project

### Conducting project reviews

The following elements are essential when reviewing projects:

- ? The process or technique you followed
- ? The performance of the team / individuals involved
- ? How well the “customers” needs have been met

### Completion Paperwork

For a project to be signed off as completed, the following paperwork should be completed and filed:

- ? TOR
- ? Responsibility Matrix
- ? Risk Management Plan
- ? Summary of actual versus planned consumption (cost & resources)
- ? Lessons Learned

Reviews concerning the methods & techniques used should be conducted, and the paperwork produced, as soon as the last activity on the project is complete. There is no need to wait for the project deliverables to go into use.

At an appropriate stage in the business cycle, after the project end date, the sponsor should initiate a Project Deliverables Review to assess the achievement of the benefits and the business lessons learned. The deliverables review may be part of a project review or may be for a standalone project. This period of waiting may be shortened or lengthened depending

on the nature of the project. Documentation resulting from the Project Deliverables Review could be lodged with a Project Support Team and be available for others to learn from.

Results of the reviews should be used when giving 360° feedback and when conducting performance appraisals of those involved with the project in any way.

The Sponsor will be accountable for ensuring that the reviews take place.

A project can only be closed down **after** the Project Reviews have occurred, the project sponsor has signed off the project **and** (ideally) the project learning has been shared with your colleagues.

### **Project File Contents**

Once a project is initiated, a project file should be created. A library will be set up and maintained by the Project Support Team (administration) for the project files though individual Project managers will be responsible for creating them. The project file will be a repository for the following information:

- ? Contents / Index
- ? TOR
- ? SCARI Matrix
- ? Risk Management Plan
- ? Project plan/schedule (kept up-to-date)
- ? Progress reports
- ? Project deliverables (master copies)
- ? Meeting notes
- ? Correspondence
- ? Details of decisions made
- ? Working papers
- ? Sign off documents

It is essential that document control be maintained over the items within the project file. Therefore, each item in the file will have a unique identifier and version number and, where necessary, a log will be maintained of who has copies to facilitate easy updating of interested parties when documents change.

On completion of the project, the project file will be stored, along with the Post Project Review reports in the project library. These can be used as case studies to aid learning and be used for reference by Project managers of future projects.

## **APPENDIX A**

### **ROLES & RESPONSIBILITIES IN DETAIL**

The following detail is provided to help you to have a debate with the role holders.

This is not intended to be used as a standard list - you should tailor the responsibilities to the specific role for the specific individual on the specific project.

## **Sponsor**

- ? Clearly understands the business need (time vs. cost vs. quality)
- ? Understands who the project end user is
- ? Clarifies roles & responsibilities with the Project Manager as appropriate
- ? Defines & communicates success criteria for the project
- ? Makes him/herself available to the Project Manager as appropriate
- ? Sets realistic but challenging targets
- ? Chairs the steering group (if one is established)
- ? Signs-off the TOR
- ? Makes own resources available to the project team if appropriate
- ? Communicates the project vision and its business priority
- ? Believes in the intended outcome (enthusiastic)
- ? Shows commitment (invests time)
- ? Sells the project to key stakeholders
- ? Removes obstacles
- ? Manages the political barriers and removes obstacles to success
- ? Resolves conflict
- ? Monitors progress
- ? Controls or limits change to objectives, scope, requirements, timescale & budget
- ? Keeps stakeholders informed
- ? Ensures business review of the project
- ? Monitors the realisation of the business benefits
- ? Formally closes the project
- ? Provides feedback to the contributors
- ? Learns from experience

### **Project Manager**

- ? Defines resource requirements for project
- ? Produces & agree the TOR with the sponsor
- ? Briefs the team with the business strategy & project vision
- ? Communicates priorities to the team
- ? Produces the project schedule & budgets with input from the team
- ? Agrees project schedule/ budget with the sponsor
- ? Allocates work to the team
- ? Monitors project progress
- ? Communicates project progress to sponsor / stakeholders
- ? Controls & communicates change to key stakeholders & the team
- ? Resolves conflict within the project
- ? Supports the project team
- ? Conducts the project evaluation & communicates results
- ? Requests project close down
- ? Recognises & rewards the contributors
- ? Gives feedback to project team members
- ? Learns from experience

### **Team Members**

- ? Prepares for and attends project briefing from project manager
- ? Support the Project manager
- ? Input to the project TOR and project schedule
- ? Support other team members
- ? Undertake tasks as per the project schedule
- ? Report progress to the Project manager
- ? Identify conflicts / need for change
- ? Spot opportunities and input ideas to the project
- ? Support the Project manager in evaluating the project
- ? Recognise individual contributions
- ? Provide feedback to the project manager and other team members
- ? Learn from experience

## Key Users

- ? Makes him/herself available
- ? Owns the deliverables of the project
- ? Makes needs/wants known
- ? Checks deliverables meet needs
- ? Realises the business benefits
- ? Recognises individual contributions
- ? Has an interest in the project outcome
- ? Communicates details of the project to their department
- ? Ensures the project fits with the departmental strategy
- ? Makes resources available to the project team
- ? Removes departmental politics and obstacles to success
- ? Strives for the top with all projects undertaken

## Project Support

- ? Store TOR and plans
- ? Allocate resources to the project manager
- ? Schedule resources to meet project schedules
- ? Confirm resource allocation with project managers
- ? Produce overall resource plan
- ? Track resource usage against resource plan
- ? Track & report overall progress
- ? Communicate resource usage to management
- ? Supports the management in resolving resourcing conflicts
- ? Develop project file mechanisms to aid storage of information
- ? Formally release resources from projects upon completion
- ? Maintain project evaluation statistics
- ? Maintain project library
- ? Establishes & monitors effective document control procedures
- ? Monitor resource utilisation
- ? Recognise individual contribution
- ? Provide information to support the development of estimating techniques

## **Critical Success Factor's for the Teams**

### **Project Team:**

- ? Meet frequently and regularly
- ? Do work assigned in timescale agreed
- ? Give appropriate time to the project
- ? Believe in the project
- ? Offer creative but practical solutions
- ? Deliver quality, on time, within budget

### **Steering Group:**

- ? Meet
- ? Proper representation
- ? Agreed and understood responsibilities
- ? Believe in the project
- ? Have a clear understanding of business strategy

# Changescape

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