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Project Management Best Practices

White Paper

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Project Management Best Practices

Process Overview

A formal project management process is crucial to the overall success of any project. The objective of a formal project management process is to provide a detailed plan and set of deliverables that can be easily tracked, controlled, measured, and reported on to assure the proposed solution is delivered on time and within budget while meeting the strictest quality standards.

To achieve this, consulting firms and project managers invest significantly in standard project management methodologies and shared project management knowledge databases. Various tools enable them to embed in each project plan management standards aimed at providing consistency and quality in the deliverables to the customer/client of the services provided by the project, plus optimal use of key resources. While any project proposal is unique, project managers are also able to capitalize on re-use of successful project plans in similar projects and engagements, by building a Repository of project templates, and collecting actual experiences. All of this shared knowledge and actual experience data is available to the project manager during the management of any project or assignment.

The standard templates contain information to support each phase of the project that can be adapted to meet the varied conditions of each customer/client. They highlight those activities and deliverables that are essential parts of every project while describing other activities that may also be needed. The project manager is able to complete all project management control, documentation, metrics and reporting requirements by following the template.

The standard templates provide a checklist for mapping out a solid project management process. This checklist is periodically referenced and monitored during the project and provides for the creation of the following set of deliverables and control mechanisms:

- A formal project plan & budget
- A formal process to identify, document, escalate, and track outstanding project issues
- A project steering committee, or project sponsor
- A formal communications infrastructure
- A formal process to identify, document, scope, approve, and track change requests
- Bi-weekly status reports to be produced and distributed to the entire project team

Project Management Deliverables

Inherent to all effectively managed projects are a set of clear-cut deliverables for each stage of any given project. The following deliverables are in addition to customer/client specified deliverables:

- A **Project Statement** is prepared to precisely define the scope of an project and associated work plan.
- A **Project Plan** is required to estimate the effort and costs of producing the defined deliverables and to allocate the resources for producing them.
- A **Quality Statement** is required in the Project Statement to document whether the project will follow best practice procedures or other procedures required by the customer/client. Quality procedures include:
    - Issue Management
    - Change Management
    - Configuration Management
    - Correspondence Management
    - Customer/Client Supplied Material
- The **Deliverables Definition** document is required to identify and document the set of tangible products to be delivered to the customer/client as well as defining the acceptance process

The **Project Organization** document is required to show the relationship of each team member to the team and define the roles and responsibilities of each function in the team structure.

Project Control Mechanisms & Metrics

Effective project managers will ensure that the proper control mechanisms are in place, and that project metrics are established and measured to ensure the project remains on time and on budget while achieving the deliverables outlined in the project plan.

- **Project Status Report** documents the achievements and current status of the project so that the customer/client and the project manager hold a common view of progress. The project status report includes summary financial information.
- **Project Review Committee** is established to further facilitate control and measurement tracking. This consists of senior management, external to the project, and is conducted every 6 weeks using the project financial plan and project status reports.

- **Project Reviews** are essential to ensure the quality of project deliverables and to monitor compliance with standards and procedures.

Project Engagement Checklist is periodically reviewed and approved throughout the project. Periodic review of the project manager's checklist is essential to ensure the project is conducted successfully in accordance with the project agreement or contract, and the plans.

Mandatory Components for Successful Project Management

To make certain the project adheres to quality standards, the following activities are essential for **all** projects, and are embedded in all project plans. The form of some components, such as project briefs, **must** be adhered to, while others, will vary in style (such as deliverables) and level of detail (such as the project statement), depending on the nature of the project and the customer/client's requirements.

- The project manager's checklist must be used throughout the project to ensure all aspects of project management are considered and to ensure all appropriate reviews and checkpoints are conducted
- The project initiation briefing - meetings between the customer/client and the project manager must be conducted to ensure a clear understanding of the objectives and expectations
- The project file must be established, maintained and re-useable material from the file must be identified and the file finally closed to ensure all relevant material is kept where it can be easily located, either electronically or by hardcopy
- The project statement must be developed and formally approved to confirm details of the project's objectives, requirements, deliverables and expectations
- Appropriate quality procedures for change, issue, configuration, customer/client supplied material and correspondence management are in place
- Assignment briefs and de-briefs must be prepared and conducted
- Deliverables must be prepared and formally approved
- Project status reports must be prepared
- A final report to the customer/client must be prepared to confirm that the project is completed. This includes customer/client sign-off
- A project completion and feedback report must be prepared