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PROJECT MANAGEMENT GUIDEBOOK

ISBN 0-473-10445-8

About this ebook

Hi and thank you for downloading this free ebook from www.Method123.com

This ebook helps you to manage projects more successfully by describing each of the steps in the Project Lifecycle.

Every phase, activity and task is described, helping you to apply a *best practice approach* to managing your project.

If you want to deliver your projects on time and within budget, then this short ebook will give you the knowledge you're looking for.

By reading it you will learn how to initiate, plan, execute and close projects properly.

You'll also learn how to manage time, cost, quality, change, risk and issues. And finally, you'll learn how to manage staff, customers and suppliers.

For the complete set of project management templates which complement this ebook, see www.Method123.com

There you will find a comprehensive suite of **templates** to help you complete *every step* in the project lifecycle.

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We hope you find it valuable….

Kind regards

Jason Westland, CEO

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1. Introduction

1.1 Welcome

Welcome to the *Project Management Guidebook*. This Guidebook provides a practical approach to what many consider a complex process: *the management of projects*. This Guidebook is designed to simplify the management processes required to manage a project successfully from end to end. It defines Project Management in simple terms and provides you with all of the documentation tools required to make your project a success.

1.2 What is a Project?

A project is "a unique endeavor to produce a set of deliverables within clearly specified time, cost and quality constraints".

Projects are different from standard business operational activities as they:

- Are **unique** in nature. They do not involve repetitive processes. Every project undertaken is different from the last, whereas operational activities often involve undertaking repetitive (identical) processes
- Have a defined **timescale**. Projects have a clearly specified start and end date within which the deliverables must be produced to meet a specified customer requirement
- Have an approved **budget**. Projects are allocated a level of financial expenditure within which the deliverables must be produced to meet a specified customer requirement
- Have limited **resources**. At the start of a project an agreed amount of labor, equipment and materials is allocated to the project
- Involve an element of **risk**. Projects entail a level of uncertainty and therefore carry business risk
- Achieve beneficial **change**. The purpose of a project, typically, is to improve an organization through the implementation of business change.

1.3 What is Project Management?

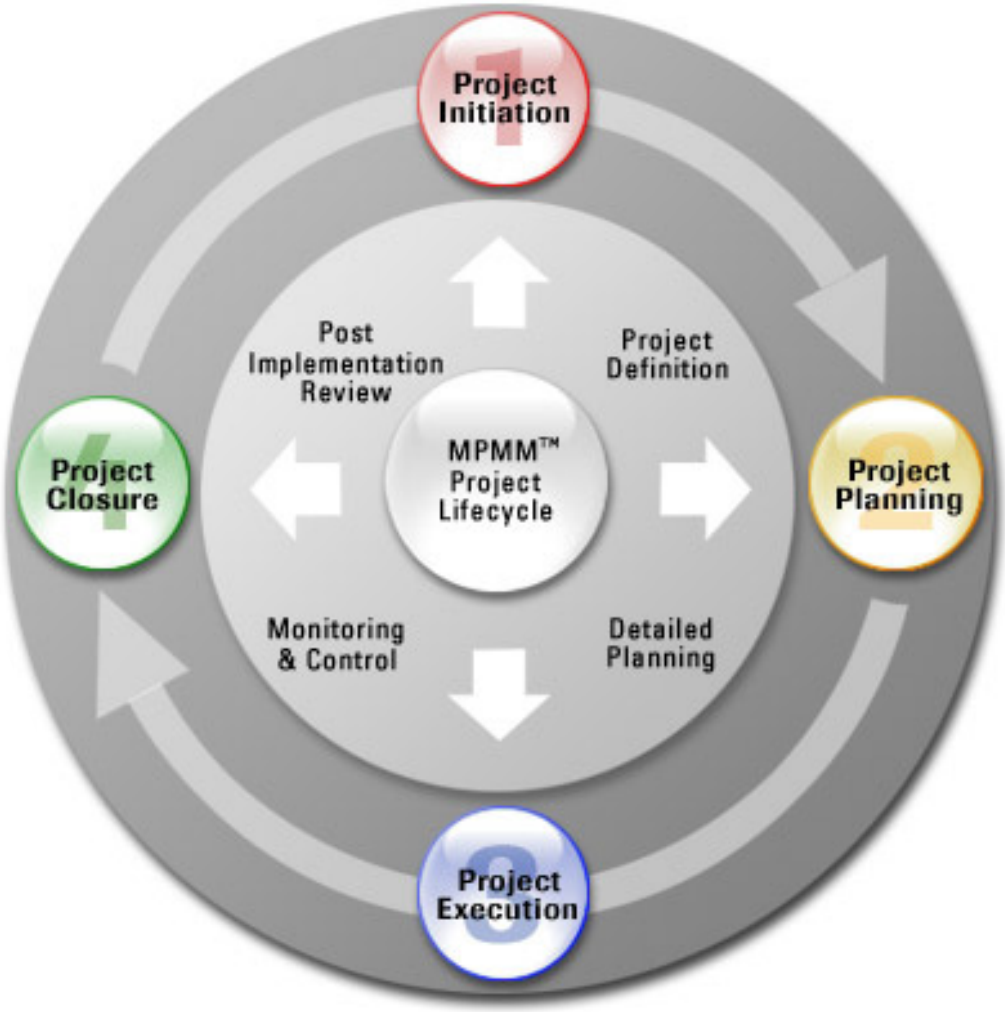
"Project Management is the skills, tools and management processes required to undertake a project successfully".

Project Management comprises:

- A set of **skills**. Specialist knowledge, skills and experience are required to reduce the level of risk within a project and thereby enhance its likelihood of success
- A suite of **tools**. Various types of tools are used by project managers to improve their chances of success. Examples include document templates, registers, planning software, modeling software, audit checklists and review forms
- A series of **processes**. Various management techniques and processes are required to monitor and control time, cost, quality and scope on projects. Examples include time management, cost management, quality management, change management, risk management and issue management.

2. Project Lifecycle

The following diagram outlines the *Project Life-Cycle*.



The *Project Lifecycle* consists of four phases:

Project Initiation

The Initiation Phase is the first phase in the project. In this phase a business problem (or opportunity) is identified and a business case which provides various solution options is defined. A feasibility study is then conducted to investigate the likelihood of each solution option addressing the business problem and a final recommended solution is put forward. Once the recommended solution is approved, a project is initiated to deliver the approved solution. A 'Project Charter' is completed, which outlines the objectives, scope and structure of the new project, and a Project Manager is appointed. The Project Manager begins recruiting a project team and establishes a Project Office environment. Approval is then sought to move into the detailed planning phase.

Project Planning

Once the scope of the project has been defined in the Project Charter, the project enters the detailed planning phase. This involves the creation of a:

- Project Plan (outlining the activities, tasks, dependencies and timeframes)
- Resource Plan (listing the labor, equipment and materials required)
- Financial Plan (identifying the labor, equipment and materials costs)
- Quality Plan (providing quality targets, assurance and control measures)
- Risk Plan (highlighting potential risks and actions taken to mitigate them)
- Acceptance Plan (listing the criteria to be met to gain customer acceptance)
- Communications Plan (listing the information needed to inform stakeholders)
- Procurement Plan (identifying products to be sourced from external suppliers).

At this point the project has been planned in detail and is ready to be executed.

Project Execution

This phase involves the execution of each activity and task listed in the Project Plan. While the activities and tasks are being executed, a series of management processes are undertaken to monitor and control the deliverables being output by the project. This includes the identification of changes, risks and issues, the review of deliverable quality and the measurement of each deliverable being produced against the acceptance criteria. Once all of the deliverables have been produced and the customer has accepted the final solution, the project is ready for closure.

Project Closure

Project Closure involves releasing the final deliverables to the customer, handing over project documentation, terminating supplier contracts, releasing project resources and communicating the closure of the project to all stakeholders. The last remaining step is to undertake a Post Implementation Review to quantify the overall success of the project and list any lessons learnt for future projects.

The following sections provide a more detailed description of each phase and list document templates which provide the Project Manager with guidance on how to complete each phase successfully.

2.1 Initiation

The initiation phase essentially involves the project 'start-up'. It is the phase within which the business problem or opportunity is identified, the solution is agreed, a project formed to produce the solution and a project team appointed. The following diagram depicts the activities undertaken:

2.1.1 Develop Business Case

Once a business problem or opportunity has been identified, a Business Case is prepared. This includes:

- A detailed definition of the problem or opportunity
- An analysis of the potential solution options available. For each option, the potential benefits, costs, risks and issues are documented. A formal feasibility study may be commissioned if the feasibility of any particular solution option is not clear
- The recommended solution and a generic implementation plan.

The Business Case is approved by the Project Sponsor and the required funding is allocated to proceed with the project.

Template: Business Case

2.1.2 Perform Feasibility Study

At any stage during (or after) the development of a Business Case, a formal Feasibility Study may be commissioned. The purpose is to assess the likelihood of a particular solution option's achieving the benefits outlined in the Business Case. The Feasibility Study will also investigate whether the forecast costs are reasonable, the solution is achievable, the risks are acceptable and/or any likely issues are avoidable.

Template: Feasibility Study

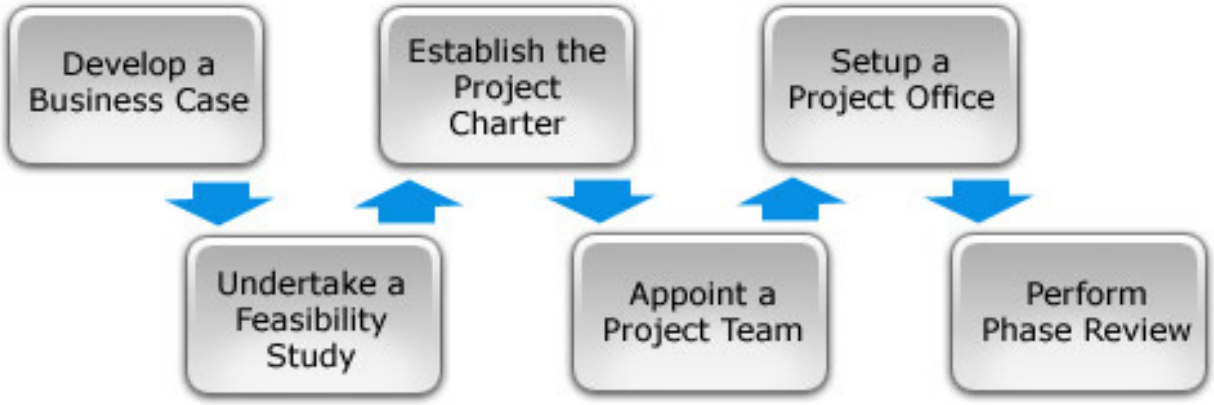
2.1.3 Establish Project Charter

After the solution has been agreed and funding allocated, a *project* is formed. The Project Charter defines the vision, objectives, scope and deliverables for the project. It also provides the organization structure (roles and responsibilities) and a summarized plan of the activities, resources and funding required to undertake the project. Finally, any risks, issues, planning assumptions and constraints are listed.

Template: Project Charter

2.1.4 Appoint Project Team

At this point the scope of the project has been defined in detail and the project team are ready to be appointed. Although a Project Manager can be appointed at any stage of the project, s/he will need to be appointed prior to the establishment of the project team. The Project Manager documents a detailed Job Description for each project role and appoints a human resource to each role based on his/her relevant skills and experience. Once the team are 'fully resourced', the Project Office is ready to be set-up.



Template: Job Description

2.1.5 Set up Project Office

The Project Office is the physical environment within which the team will be based. Although it is usual to have one central project office, it is possible to have a 'virtual project office' environment, with project team members in various locations around the world. Regardless of the location, a successful project office environment will comprise the following components:

- Location (either physical or virtual)
- Communications (telephones, computer network, email, internet access, file storage, database storage and backup facilities)
- Documentation (methodology, processes, forms and registers)
- Tools (for accounting, project planning and risk modeling).

Template: Project Office Checklist

2.1.6 Perform Phase Review

At the end of the Initiation Phase, a Phase review is performed. This is basically a checkpoint to ensure that the project has achieved its stated objectives as planned.

Template: Phase Review Form

2.2 Planning

By this stage, the benefits and costs of the project have been clearly documented, the objectives and scope have been defined, the project team has been appointed and a formal project office environment established. It is now time to undertake detailed planning to ensure that the activities performed in the execution phase of the project are properly sequenced, resourced, executed and controlled.

2.2.1 Develop Project Plan

The first step is to document the Project Plan. A 'Work Breakdown Structure' (WBS) is identified, which includes a hierarchical set of phases, activities and tasks to be undertaken on the project. After the WBS has been agreed, an assessment of the effort required to undertake the activities and tasks is made. The activities and tasks are sequenced, resources are allocated and a detailed project schedule is formed. This project schedule will become the primary tool for the Project Manager to assess the progress of the project.

Template: Project Plan

2.2.2 Develop Resource Plan

Immediately after the Project Plan is formed, it is necessary to allocate the resources required to undertake each of the activities and tasks within the Project Plan. Although general groups of resources may have already been allocated to the Project Plan, a detailed resource assessment is required to identify the:

- Types of resources (labor, equipment and materials)
- Total quantities of each resource type
- Roles, responsibilities and skill-sets of all human resources
- Items, purposes and specifications of all equipment resource
- Items and quantities of material resource.

A schedule is assembled for each type of resource so that the Project Manager can assess the resource allocation at each stage in the project.

Template: Resource Plan

2.2.3 Develop Financial Plan

Similar to the Resource Plan, a Financial Plan is prepared to identify the quantity of money required for each stage in the project. The total cost of labor, equipment and materials is quantified and an expense schedule is defined which provides the Project Manager with an understanding of

the forecast spending vs. the actual spending throughout the project. Preparing a detailed Financial Plan is extremely important as the project's success will depend on whether or not it is delivered within the 'time, cost and quality' estimates for this project.

Template: Financial Plan

2.2.4 Develop Quality Plan

Meeting the quality expectations of the customer is critical to the success of the project. To ensure that the quality expectations are clearly defined and can reasonably be achieved, a Quality Plan is documented. The Quality Plan:

- Defines what quality means in terms of this project
- Lists clear and unambiguous quality targets for each deliverable. Each quality target provides a set of criteria and standards which must be achieved to meet the expectations of the customer
- Outlines a plan of activities which will assure the customer that the quality targets will be met (i.e. a Quality Assurance Plan)
- Identifies the techniques used to control the actual level of quality of each deliverable as it is built (i.e. a Quality Control Plan).

Finally, it is important to review the quality not only of the deliverables produced by the project but also of the management processes which produce them. A summary of each of the management processes undertaken during the execution phase is identified, including Time, Cost, Quality, Change, Risk, Issue, Procurement, Acceptance and Communications Management.

Template: Quality Plan

2.2.5 Develop Risk Plan

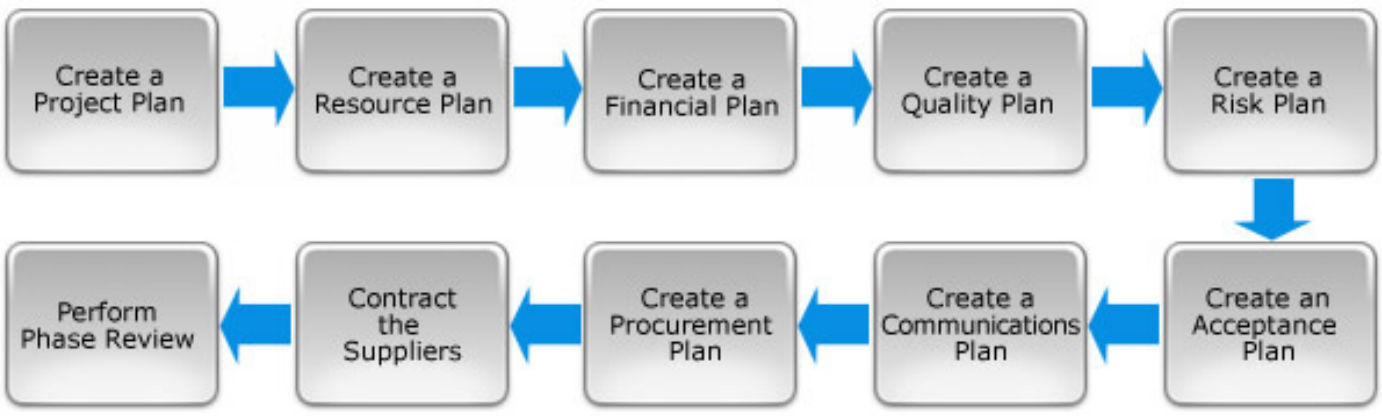
The foreseeable project risks are then documented within a Risk Plan and a set of actions to be taken formulated to both prevent each risk from occurring and reduce the impact of the risk should it eventuate. Developing a clear Risk Plan is an important activity within the planning phase as it is necessary to mitigate all critical project risks prior to entering the Execution phase of the project.

Template: Risk Plan

2.2.6 Develop Acceptance Plan

The key to a successful project is gaining acceptance from the customer that each deliverable produced meets (or exceeds) his/her requirements. To clarify the criteria used to judge each deliverable for customer acceptance, an Acceptance Plan is produced. The Acceptance Plan provides the criteria for obtaining customer acceptance, a schedule of acceptance reviews within which customer acceptance will be sought and a summary of the process used to gain acceptance of each deliverable from the customer.

Template: Acceptance Plan



2.2.7 Develop Communications Plan

Prior to the Execution phase, it is also necessary to identify how each of the stakeholders will be kept informed of the progress of the project. The Communications Plan identifies the types of information to be distributed, the methods of distributing information to stakeholders, the frequency of distribution and responsibilities of each person in the project team for distributing information regularly to stakeholders.

Template: Communications Plan

2.2.8 Develop Procurement Plan

The last planning activity within the Planning phase is to identify the elements of the Project which will be acquired from external suppliers to the project. The Procurement Plan provides a detailed description of the Products (i.e. goods and services) to be procured from suppliers, the justification for procuring each product externally, as opposed to from within the business, and the schedule for procurement. It also references the process for the selection of a preferred supplier ("Tender Process") and the process for the actual order and delivery of the procured products ("Procurement Process").

Template: Procurement Plan

2.2.9 Contract Suppliers

Although external suppliers may be appointed at any stage of the project, it is usual to appoint suppliers after the Project Plans have been documented but prior to the Execution phase of the project. Only at this point will the Project Manager have a clear idea of the role of the supplier and the expectations for his/her delivery. A formal Tender Process is invoked to identify a short-list of interested suppliers and select a preferred supplier to meet the procurement needs of the project. The Tender Process involves creating a Statement of Work, a Request for Information and Request for Proposal to obtain sufficient information from each potential supplier to select a preferred supplier. Once a preferred supplier has been chosen, a Supplier Contract is agreed for the delivery of the requisite product.

Templates: Statement of Work, Request for Information, Request for Proposal, Supplier Contract

2.2.10 Perform Phase Review

At the end of the Planning phase, a Phase review is performed. This is basically a checkpoint to ensure that the project has achieved its stated objectives as planned.

Template: Phase Review Form

2.3 Execution

The Execution phase is typically the longest phase of the project (in terms of duration). It is the phase within which the deliverables are physically constructed and presented to the customer for acceptance. To ensure that the customer's requirements are met, the Project Manager monitors and controls the activities, resources and expenditure required to build each deliverable throughout the execution phase. A number of management processes are also undertaken to ensure that the project proceeds as planned.

2.3.1 Build Deliverables

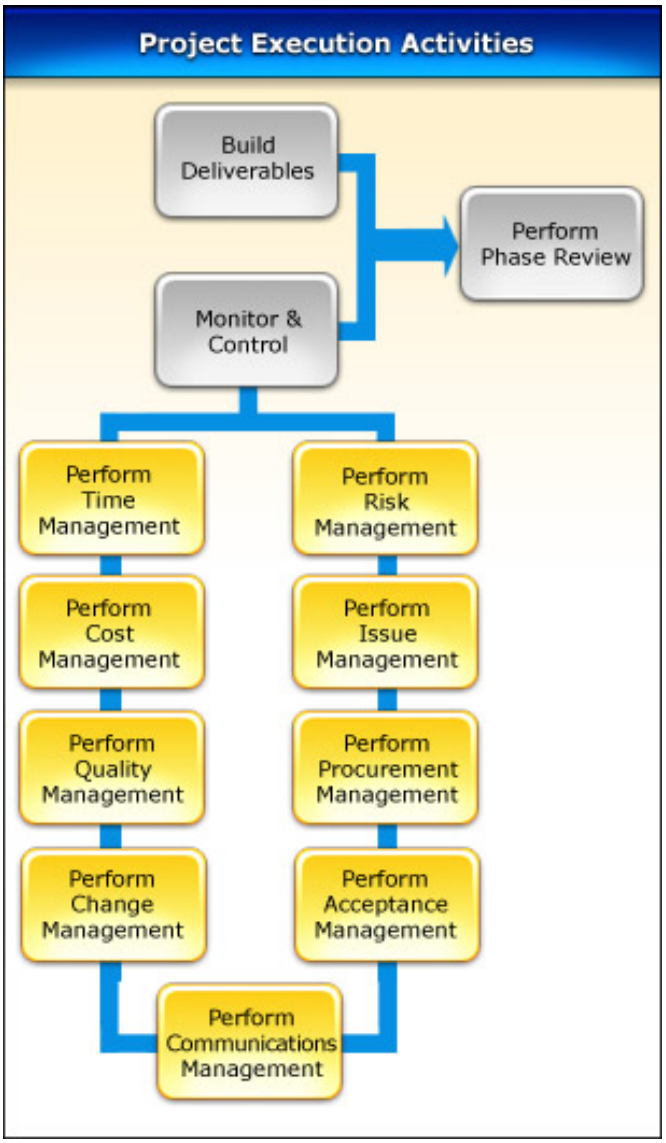
This phase requires the physical construction of each deliverable for acceptance by the customer. The actual activities undertaken to construct each deliverable will vary, depending on the type of project (e.g. engineering, building development, computer infrastructure or business process re-engineering projects). Deliverables may be constructed in a 'waterfall' fashion (where each activity is undertaken in sequence until the deliverable is finished) or an 'iterative' fashion (where iterations of each deliverable are constructed until the deliverable meets the requirements of the customer). Regardless of the method used to construct each deliverable, careful monitoring and control processes should be employed to ensure that the quality of the final deliverable meets the acceptance criteria set by the customer.

2.3.2 Monitor and Control

Whilst the Project Team are physically producing each deliverable, the Project Manager implements a series of management processes to monitor and control the activities being undertaken. An overview of each management process follows.

Time Management

Time Management is the process within which time spent by staff undertaking project tasks is recorded against the project. As time is a scarce resource on projects, it is important to record the time spent by each member of the team on a Timesheet to enable the Project Manager to control the level of resource allocated to a particular activity. A Timesheet Register provides a summary of the time currently spent on the project and enables the Project Plan to be kept fully up to date.



Templates: Time Management Process, Timesheet Form, Timesheet Register

Cost Management

Cost Management is the process by which costs (or expenses) incurred on the project are formally identified, approved and paid. Expense Forms are completed for each set of related project expenses such as labor, equipment and materials costs. Expense Forms are approved by the Project Manager and recorded within an Expense Register for audit purposes.

Templates: Cost Management Process, Expense Form, Expense Register

Quality Management

Quality is defined as "the level of conformance of the final deliverable to the customer's requirements". Quality Management is the process by which the quality of the deliverables is assured and controlled for the project, using Quality Assurance and Quality Control techniques. Quality reviews are frequently undertaken and the results recorded within a Quality Register.

Templates: Quality Management Process, Quality Review Form, Deliverables Register

Change Management

Change Management is the process by which changes to the project's scope, deliverables, timescales or resources are formally defined, evaluated and approved prior to implementation. A core aspect of the Project Manager's role is to manage change within the project successfully. This is achieved by understanding the business and system drivers requiring the change, documenting the benefits and costs of adopting the change and formulating a structured plan for implementing the change. To formally request a change it is often necessary to complete a Change

Form. The change request details may then be recorded within a Change Register.

Templates: Change Management Process, Change Form, Change Register

Risk Management
Risk Management is the process by which risks to the project (e.g. to the scope, deliverables, timescales or resources) are formally identified, quantified and managed during the project. A project risk may be identified at any stage of the project by completing a Risk Form and recording the relevant risk details within the Risk Register.

Templates: Risk Management Process, Risk Form, Risk Register

Issue Management
Issue Management is the method by which issues currently affecting the ability of the project to produce the required deliverable are formally managed. After completion of an Issue Form (and logging the details within the Issue Register), each issue is evaluated by the Project Manager and a set of actions undertaken to resolve the issue at hand.

Templates: Issue Management Process, Issue Form, Issue Register

Procurement Management
Procurement Management is the process by which product is sourced from an external supplier. To request the delivery of product from a supplier, a Purchase Order must be approved by the Project Manager and sent to the supplier for confirmation. The status of the purchase is then tracked using a Procurement Register until the product has been delivered and accepted by the project team.
Templates: Procurement Management Process, Purchase Order Form, Procurement Register

Acceptance Management
Acceptance Management is the process by which deliverables produced by the project are reviewed and accepted by the customer as meeting his/her specific requirements. To request the acceptance of a deliverable by the customer, an Acceptance Form is completed. The Acceptance Form describes the criteria from which the deliverable has been produced and the level of satisfaction of each criterion listed.

Templates: Acceptance Management Process, Acceptance Form, Acceptance Register

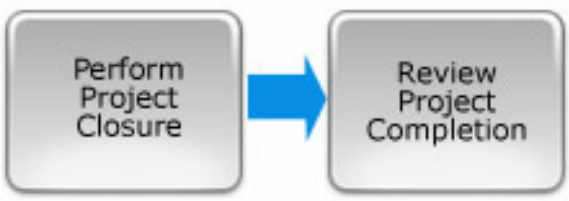
Communications Management
Communications Management is the process by which formal communications messages are identified, created, reviewed and communicated within a project. The most common method of communicating the status of the project is via a Project Status Report. Each communication item released to the project stakeholders is captured within a Communications Register.

Templates: Communications Management Process, Project Status Report, Communications Register

2.3.3 Perform Phase Review
At the end of the Execution Phase, a Phase review is performed. This is basically a checkpoint to ensure that the project has achieved its stated objectives as planned.

Template: Phase Review Form

2.4 Closure
Following the completion of all project deliverables and acceptance by the customer, a successful project will have met its objectives and be ready for formal closure. Project Closure is the last phase in the project and must be conducted formally so that the business benefits delivered by the project are fully realized by the customer.



2.4.1 Perform Project Closure

Project Closure involves undertaking a series of activities to wind up the project, including:

- Assessing whether the project completion criteria have been met
- Identifying any outstanding items (activities, risks or issues)
- Producing a hand-over plan to transfer the deliverables to the customer environment
- Listing the activities required to hand over documentation, cancel supplier contracts and release project resources to the business
- Communicating closure to all stakeholders and interested parties.

A Project Closure Report is submitted to the Customer and/or Project Sponsor for approval. The Project Manager is then responsible for undertaking each of the activities identified within the Project Closure Report on time and according to budget. The project is closed only when all activities identified in the Project Closure Report have been completed.

Template: Project Closure Report

2.4.2 Review Project Completion

The final activity undertaken on any project is a review of its overall success by an independent resource. Success is determined by how well it **performed** against the defined objectives and **conformed** to the management processes outlined in the planning phase. To determine *performance*, a number of questions are posed. For example:

- Did it result in the benefits defined in the Business Case?
- Did it achieve the objectives outlined in the Project Charter?
- Did it operate within the scope of the Project Charter?
- Did the deliverables meet the criteria defined in the Quality Plan?
- Was it delivered within the schedule outlined in the Project Plan?
- Was it delivered within the budget outlined in the Financial Plan?

To determine *conformance*, a review is undertaken of the level of conformity of the project activities to the management processes outlined in the Quality Plan. The above results, key achievements and lessons learnt are documented within a Post Implementation Review report and presented to the Project Sponsor for approval.

Template: Post Implementation Review

3. Appendix

3.1 Additional Resources

And that's it! If you complete the steps described in this ebook, then you'll deliver more projects *on time and within budget.*

Hopefully you've found this ebook useful, by telling you **what** you need to do to deliver projects successfully.

If you'd now like to know **how** to deliver successful projects, then download the Project Management Kit.

This kit includes **all of the templates** listed in this ebook. The templates describe *how* to complete each step in the project lifecycle, helping you deliver projects faster and easier than before.

It saves you *time and effort* by giving you:

- **Templates** to create deliverables
- **Forms** to resolve risks and issues
- **Plans** to schedule tasks & resources
- **Processes** to monitor project delivery
- **Reports** to communicate status
- **Charts** to control project change
- **Procedures** to improve quality
- **Checklists** to measure success.

It also **helps you get a head-start** because:

1. It tells you *which* deliverables to create
2. It explains *how* and *when* to create them
3. Each template is *pre-formatted*
4. It includes practical examples, tips & hints
5. You simply open the templates in Word or Excel and **fill in the gaps**. You'll complete tasks faster and make your life much easier than before.

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"This kit gives you the complete set of templates for managing projects. It's great!"

Project Management Institute
Pamela Good, Vice President, Buffalo USA

3.2 Glossary of Terms

The following definitions apply to terminology used within the *Project Lifecycle*:

Acceptance Management

The process by which deliverables produced by the project are reviewed and accepted by the customer as meeting their specific requirements

Acceptance Planning

The process of identifying the milestones, criteria and standards for the acceptance of project deliverables by the customer

Business Case

A document outlining the justification for the initiation of a project. It includes a description of the business problem (or opportunity), a list of the available solution options, their associated costs and benefits and a preferred option for approval

Change Management

The process by which changes to the project scope, deliverables, timescales or resources are formally defined, evaluated and approved prior to implementation

Communications Management

The process by which formal communications messages are identified, created, reviewed and communicated within a project

Communications Planning

The process of identifying the type and regularity of information to be provided to all project stakeholders to keep them informed of the progress of the project

Cost Management

The process by which costs (or expenses) incurred on the project are formally identified, approved and paid

Deliverable

A quantifiable outcome of the project which results in the partial (or full) achievement of the project objectives

Dependency

A logical relationship between two or more project activities. The four types of dependencies include: start-to-finish, start-to-start, finish-to-start, finish-to-finish

Feasibility Study

A document which identifies each of the solution options to a particular business problem (or opportunity) and assesses the likelihood of each option's achieving the desired result

Financial Planning

The process of identifying the financial resources required to undertake the project. This includes a list of the types of costs to be incurred on the project (e.g. labor, equipment, materials and administration costs) and a schedule outlining when the respective costs are likely to be incurred

Issue

Events which are currently affecting the ability of the project to produce the required deliverables

Issue Management

The process by which issues are formally identified, communicated, monitored and resolved

Job Description

A document which describes a particular role and its responsibilities within a project

Milestone

The recognition of an important event within the project, usually the achievement of a key project deliverable

Procurement Management

The process by which product is actually sourced from a preferred supplier, including the on-going management of the supplier relationship

Procurement Planning

The process of identifying the products to be sourced externally and the methods for acquiring them

Product

A good or service which is acquired from an external supplier to assist with the production of a project deliverable

Project

A unique endeavor to produce a set of deliverables within clearly specified time, cost and quality constraints

Project Activity

A set of project tasks which usually results in the partial (or full) completion of a project deliverable

Project Lifecycle

A series of project phases which are undertaken in either sequential or parallel order

Project Management

The skills, tools and management processes required to successfully undertake a project

Project Office

The physical premises within which Project Administration staff (e.g. the Project Manager and support staff) reside

Project Phase

A set of project activities and tasks which usually result in the completion of a project deliverable

Project Plan

A document which lists the phases, activities, tasks, timeframes and resources required to complete the project

Project Schedule

A series of planned dates within which activities and tasks have to be completed to achieve project milestones

Project Task

A specific work item to be undertaken which usually results in the partial completion of a project deliverable

Project Team

A collation of people who report to the Project Manager

Quality

The level of conformance of the final deliverable(s) to the customer's requirements

Quality Assurance

The preventative steps taken to eliminate any variances in the quality of the deliverable produced from the quality targets set

Quality Control

The curative steps taken to eliminate any variances in the quality of the deliverable produced from the quality targets set

Quality Management

The process by which the quality of the deliverables and management processes is assured and controlled for the project, using Quality Assurance and Quality Control techniques

Quality Planning

The process of identifying the approach taken to ensure the quality of the deliverables produced by the project and of the management processes undertaken. This includes a list of the quality criteria and standards to be achieved as well as the Quality Assurance and Quality Control techniques to be undertaken

Request for Information

A document which is issued by a project to a wide group of potential suppliers to enable those suppliers to provide summarized information outlining how they will meet the procurement requirements of the project

Request for Proposal

A document which is issued by a project to a short-listed group of suppliers to enable the suppliers to submit a detailed proposal outlining how they will meet the procurement requirements of the project

Resource

The labor, equipment and materials used to complete the activities in the Project

Resource Planning

The process of identifying the resources required to complete the project. This includes a list of the types of resources required and a schedule providing the use of and activities undertaken by each resource

Risk

Any event which is likely to adversely affect the ability of the project to achieve the defined objectives

Risk Management

The process by which risks to the project (e.g. to the scope, deliverables, timescales or resources) are formally identified, quantified and managed during the project. The process entails completing a number of actions to reduce the likelihood of occurrence and the severity of impact of each risk

Risk Mitigation

A set of actions to be taken to avoid, transfer or mitigate a risk, based on its priority. This includes the *preventative* actions to be taken during the project to reduce the likelihood of the risk's occurring as well as the *contingent* actions to be taken to reduce the impact on the project should the risk eventuate

Risk Planning

The formulation of a document which outlines the foreseeable project risks and provides a set of actions to be taken to both prevent the risk from occurring and reduce the impact of the risk should it eventuate

Scope

The total aggregation of deliverables to be produced by the project

Solution

A set of deliverables which, once combined, solve a particular business problem (or realize a particular business opportunity)

Stage-Gate

A checkpoint at the end of each project phase to ensure that the project has achieved its stated objectives and deliverables as planned

Statement of Work

A document which defines the procurement requirements of the project in sufficient detail to enable potential suppliers to determine if they are able to meet those requirements

Supplier Contract

An agreement between the Project Team and an external supplier for the acquisition of a defined set of products to meet the procurement requirements of the Project

Tender Document

A formal document included during the tender process which outlines the information required to provide the Project Team with the confidence that a supplier can meet the procurement needs of the project. The RFI and RFP are both examples of Tender Documents

Tender Management

The process by which interested suppliers are identified, evaluated and selected for the supply of products (goods or services) to the project. This process entails formalizing the procurement requirements and tender documentation, receiving tender responses and selecting a preferred supplier

Project Charter

A document which outlines the purpose of the project, the manner in which the project will be structured and how it will be successfully implemented

Time Management

The process within which time spent by staff undertaking project tasks is recorded against the project

See www.method123.com for the complete set of Microsoft Word and Excel document templates supporting this Guidebook.

ISBN 0-473-10445-8