



UNIT-3

Preparing your Project

Learning Outcomes

By the end of this unit the learner will be able to:

Unit 3

Preparing your Project

Things to Consider

Once you have decided which project to promote to others, there are some considerations you want to be prepared for.

Anticipation

How might I plan for objections to my project idea and prepare to respond and overcome them?

Assistance

There are people with expertise, skills, and resources available to me. How can I include them to help achieve the goals?

Location

What places would make sense for putting these ideas and the project into the minds and hearts of your audience?

Timing

In what ways could I leverage special times, days, or dates to implement this idea?

Precautions

How can I evaluate and thoroughly examine this idea? How about minimizing risk and implementing safety measures to ensure success?

Rewards

What shall I do to reward people involved? Rewards don't have to be financial; they could include a creative gift and details on how people, teams, and organizations can benefit from this.

Laying Out the Project

The Statement of Work

The terms Project Charter and Project Statement of Work (SOW) are often used interchangeably. Many companies use the word Charter to refer to the document that is actually the SOW.

The Project Management Institute (PMI) uses the term **Charter** to refer to the announcement that recognizes the authority of the project manager. The **SOW**, on the other hand, is the formal project definition document. This is an important distinction between the two.

The Statement of Work is a formal project management document that establishes expectations and agreements about the project. It is not a contract; it is a tool for clarifying responsibilities and working relationships among project stakeholders.

As they work on their Statement of Work, it becomes an opportunity for individual members of the team to see if they truly understand their project. A SOW can be anywhere from one or two to 100 pages long.

The usual minimum of a SOW includes the following elements.

Defined Purpose

Why are we doing this project? The answer to this question should be clearly spelled out in this section. In addition, the business case for the project is referenced but not necessarily detailed. (If you need a business case for a project it is typically done in a separate document, often called a cost-benefit analysis.)

Statement of Scope

What is included in this project? The statement of scope clearly describes what the project will include and any items that are seen as potentially involved but are not part of the project, or are “out of scope.” This statement is essential for the project to stay on track and budget, since other tasks, or even projects, can be related and project teams may try to delegate functions to your own project (which will put you beyond scope and probably over budget!).

How big is this project? Sometimes little projects, like moving offices within the same building, lead to bigger projects, like reorganizing workflow and changing storage methods. Be prepared for “project creep.” Anyone who has ever done a home renovation project knows about project creep. (You wanted a new railing on the back steps but before you could put on the railing, the step had to be repaired and painted. Then when you started to repair the step you realized it would be better to use cedar rather than spruce, so the whole step had to be torn apart. Once the step had been rebuilt, and you got the railing on, you realized the whole thing needed a coat of paint, and since you were going to paint the step and the railing, you might as well do the whole deck, and...)

Project Deliverables

What results are we to achieve, or what are we to produce? This helps focus the team on outcomes. It also helps individuals and sub-teams keep on track as they learn exactly what their deliverables are and when they are due. Intermediate and final deliverables should be mentioned by name. Even regular status reports, change requests, and other reports should be specified as part of the deliverables.

Goals and Objectives

Specific goals are listed, with larger goals broken into smaller goals that are all well-defined. This section will include measurement criteria, including budget criteria. (Example: New customer sales will increase by 25% within four months of introducing the new website.)

Make sure you include all aspects:

- Big Picture – Little Picture
- Corporate Goals – Departmental Goals
- Long Term Goals – Short Term Goals

SWOT

The SOW should also briefly review the big picture in terms of the organization's **Strengths, Weaknesses, Opportunities, and Threats (SWOT)**.

The rationale for this is that projects, just like regular work, flow back into the organization in terms of what business we are in, where we are going, and how we are going to get there from here.

Cost and Schedule Estimates

Prepare a draft budget. This section provides rough but well-researched estimates of both the costs and the schedule for the project. You should be able to answer the questions, "How did you arrive at that figure for the budget?" and "How was the deadline determined?" in this section of the SOW.

Projects are often done in addition to regular work, so having an idea of how much time, materials, and other resources are required is a very smart move. A fairly simple way of getting an idea of costs is to figure out how much time will be required and how much that person's time costs per hour.

List of Stakeholders

Who will be involved? Here is where you identify all the key influencers such as managers, sponsors, etc. At a minimum, you should include the names and roles of the project manager, key project team members, the sponsor, managers with an interest in the project, and the customer contacts.

Authority Levels

This section has to define **who has authority for what**, and how the lines of supervision or delegation (or chain of command) have been established. This will help project team members understand the limits to their own authority, and who they need to approach for help. An organization chart or matrix that outlines the important roles and responsibilities of the project is also useful. This approach can avoid problems such as people deferring responsibility ("Oh, I thought so and so was doing that part") or becoming territorial about parts of the project.

Assumptions and Agreements

What prior assumptions and agreements are in place? Assumptions can limit the project, and so it is important that they are detailed here. Make sure you don't omit anything that could impact the project. Remember that for the project to be a success, all side agreements must be agreed to in the SOW.

The Communication Plan

Who will we communicate to? What basic reports will be produced, and how often? What meetings will be held, particularly during the planning phase? Specify the frequency and audience of all meetings and status reports. Large projects may require more detailed communication plans.

The project manager will likely be in charge of formal communication. Who needs to know and who should be kept informed periodically? While you don't want to send information to people who won't know what you are talking about, omitting someone from the information loop is a great way to ruffle feathers unintentionally. Try not to do this.

Individual SOW

**Statement of Work
Purpose Statement**

Scope Statement

Project Deliverables

The chain of command will look like this:

Assumptions and agreements that have already been made:

My communication plan looks like this:

Who?	What?	When?	Where?	Why?	How?

Project Planning Worksheet

Basic Information

Name of Project: _____

Brief Description and Overall Benefits:

Project Number: _____

Priority Rating: _____

Request Date: _____

Other Reference Dates: _____

Time Management

Time Targets: Start _____ Finish _____ Accuracy _____

What are the primary objectives?

What are the secondary objectives?

Milestone descriptions and dates:

Plan for time control:

Cost Controls

Budget or Estimate _____

Cost (Budget) Milestones and Dates

- #1 _____
- #2 _____
- #3 _____

Financial Benefits to be Obtained:

Costs include: All External? Y/N All Internal? Y/N

Plan for Cost Control:

Results Expected

Specific objectives/results expected in order of importance

For further details, refer to documents:

Constraints on solutions:

Plan for control of results:

Plan to minimize risks:

Approvals
Project Manager

Project Manager's Supervisor

Further Reading:

- ✓ *Preparing for the Project Management Professional (PMP) Certification Exam, By Michael W. Newell, 2005*
- ✓ *Project Management Step-by-step, By Larry Richman, 2002*