

This quick reference card is a distillation of the information in the document “Project Management Guidelines”; refer to that document for more details. This describes the types of information to be gathered for each of the Phases, Activities and Tasks of the methodology.

### Definition

#### Define Project and Scope

- Identify Sponsorship & Business Objectives
- Identify Benefits of Doing Project
- Identify Impact

#### Obtain Approval

- Obtain Approval from Client & I/S Management

There are 4 major administrative tasks that come into play between Definition and Analysis and need to be considered during the rest of the project:

- Determine Project Organization
- Create/Update Project Plan
- Communicate
- Monitor Project Success Metrics

### Analysis

#### Gather Client Requirements

- Define Current State & Integration Points
- Define Future State & Integration Points
- Identify Client Requirements (gaps between current & future states)

#### Determine project feasibility

- Identify Alternatives (including advantages and disadvantages)
- Determine Impact of Each Alternative (Business, I/S, Financial & Validation)
- Recommend Preferred Alternative(s)
- Identify Project Success Factors of Preferred Alternative(s)

### Obtain Approval

- Obtain Approval from Client & I/S Management

There is a fifth administrative task that comes into play at the start of the Design Phase and also needs to be continually considered throughout the remainder of the project:

- Implement Change Control

### Design

#### Investigate Vendor Packages

- Develop Evaluation Criteria
- Develop Request for Proposals
- Evaluate Vendor Proposals/Packages
- Select a Package(s)

#### Develop Specifications

- Configure & Customize Environment
- Determine User/System Interfaces
- Define System Elements
- Define Process Flows
- Define Data Needs
- Develop Test Plan
- Develop Conversion/Contingency Plans

#### Develop Training Plan

- Develop Training Plan (with Consultation with I/S Training and Education)

#### Obtain Approval

- Obtain Approval from Client & I/S Management

### Construction

#### Construct and Test Solution

- Develop Acceptance Test Criteria
- Write/Modify Software and/or Build Physical Environment
- Perform Unit Testing
- Perform System Integration & Acceptance Testing

#### Prepare System Documentation

- Develop Documents for I/S Operations, Technical Support; End User

#### Perform Pilot

- Provide Training for Pilot Participants
- Monitor and Fine Tune System Performance

### Obtain Approval

- Obtain Approval from Client & I/S Management

### Implementation

#### Perform Client Training

- Perform Training and/or Send out Education materials

#### Migrate to Production

- Execute Conversions
- Initiate Production Operation of System

#### Perform Post Implementation Review

- Resolve Post-Implementation Issues until System is stable
- Document Lessons Learned

### LEGEND:

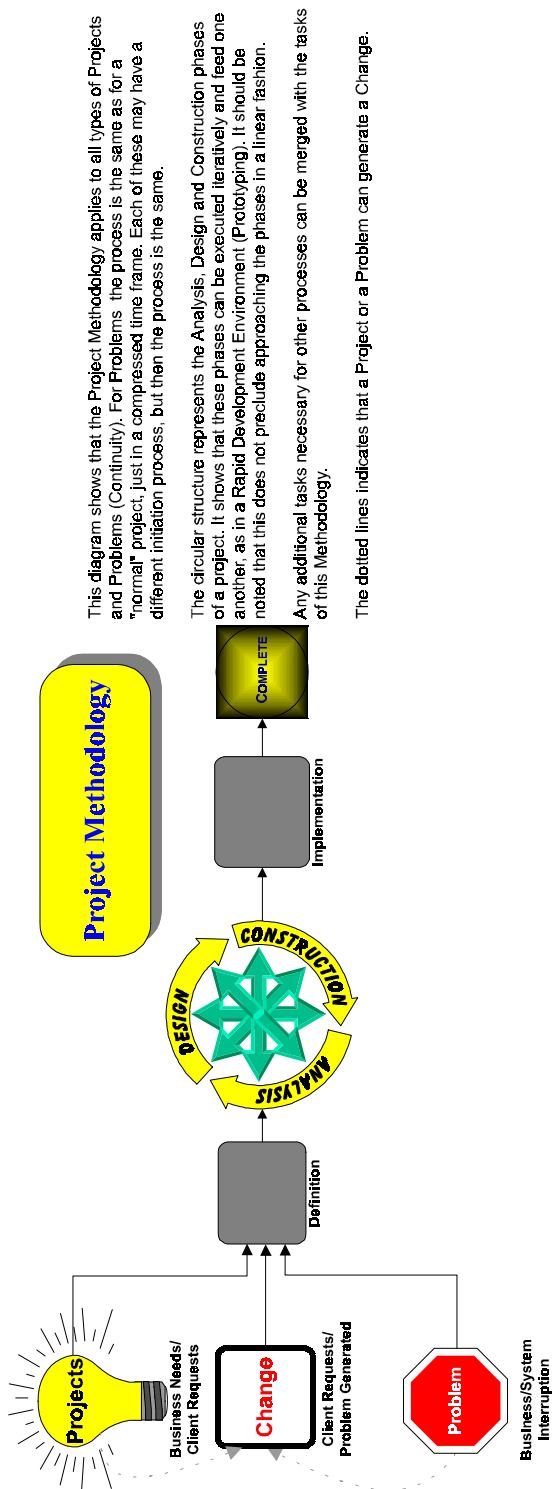
### PHASES

#### Activities

- Task1
- Task2
- etc.

### NOTE

The **Activities** and **Tasks** listed here are not all inclusive. In some cases, they may not apply to a project. Keep in mind what information is needed, and who needs it. Collect as much information as is needed to properly **COMMUNICATE** and **INTEGRATE** with other project participants and departments.



This diagram shows that the Project Methodology applies to all types of Projects and Problems (Continuity). For Problems the process is the same as for a "normal" project, just in a compressed time frame. Each of these may have a different initiation process, but then the process is the same.

The circular structure represents the Analysis, Design and Construction phases of a project. It shows that these phases can be executed iteratively and feed one another, as in a Rapid Development Environment (Prototyping). It should be noted that this does not preclude approaching the phases in a linear fashion.

Any additional tasks necessary for other processes can be merged with the tasks of this Methodology.

The dotted lines indicates that a Project or a Problem can generate a Change.

# PROJECT MANAGEMENT GUIDELINES QUICK REFERENCE



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