Project Management Essentials Curriculum

Presented for Boston College
Employee Development Office
March 17, 2016
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Today's Agenda...

- Introductions
- A Refresher – What is PM?
- Review & Selection of Projects
- The Planning Process
- Scope and Scope Statement
- Work Breakdown Structure
- Activity Resources & Durations
- Q & A???
- Group Meeting

Introductions

- Name and Job Title
- What do you do?
- Office or Department
- Prior PM Training?
What is Project Management?

Name given to the application of a specific set of tools, skills and techniques for planning, scheduling and tracking project work.

What is a Project?

"A temporary endeavor undertaken to create a unique product, service or results." - PMBOK Guide (5th edition)

- Has a definite beginning and a definite end
- Contrast with operations - ongoing and repetitive

Quick Refresher of Intro Session...

What is a Project Manager?

A person responsible for the successful planning, scheduling, and tracking of project work.
What is a Project Manager?
- Person assigned to achieve the project objectives
- Person expected to manage the project team
- Typically a temporary role, not a job description
- YOU... (yes, we're talking about you!)

Project Management Processes
1. Initiation
2. Planning
3. Executing
4. Controlling (and monitoring)
5. Closing

Change in one side MUST affect another side (or both)
Guiding Principle...

- Just enough PM - not a burden or impediment to achieving your end goal (project’s objective)

- One of the top reasons projects fail is that project managers do not adjust their project management process to the needs of each project.

One size does NOT fit all – tailor to project size, complexity, level of risk, importance to the organization, experience of team members...

Concept – The Project Lifecycle

Project Management Processes

1. Initiating
2. Planning
3. Executing
4. Controlling (and Monitoring)
5. Closing
Project Charter

Starts and authorizes the project – documents ‘hallway’ conversations and answers follow-up questions

- Project Charter / Project Definition / Business Case
  - What are you doing?
  - What are you NOT doing?
  - Why are you doing this?
  - How will you know when you’re done!

Project Charter – Contents

- Overview
- Goal
- Objectives
- Benefits
- Success Criteria
- Approach
- Assumptions
- Constraints
- Scope (in / out)
- Stakeholders
- Risks
- Milestones
- Communications
- Approval

Project Charter – BC Template
Group Project Selection Process

- Assemble into assigned Groups (check your name card!)
- Share and explain one-page summaries of projects within the Group
- Select ONE of the projects to use as basis for discussions at end of each Session
- Note that 20 minutes have been allotted for this Selection Process!

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- The Planning Process – We are HERE!
- Scope and Scope Statement
- Work Breakdown Structure
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Concept – The Project Lifecycle

Project Management Processes

1. Initiating
2. Planning
3. Executing
4. Controlling (and monitoring)
5. Closing

“Let our advance worrying become advance planning”
Winston Churchill

The Benefits of Project Planning...

“(One) area that technologically-superior companies emphasize is the quality of their planning. In most walks of life where planning is possible, people will tell you that good planning is absolutely crucial and necessary. However, almost no one does it. We have wondered why, and can only surmise that they don’t know how to, don’t have time, or can’t see the benefits.”

Dr. P.R. Nayak,
Managing Rapid Technological Development
Arthur D. Little & Company
Consequences of Inadequate Planning

1. The 50-to-1 Life Cycle Correlation
2. Resource Bottlenecks
3. Resource Underutilization
4. Abandoned or “Composted” Projects
5. Chaos & Mayhem When (NOT “IF”) Changes Occur

The Value of Greater Investment in Planning...Cautionary Tale

Planning With Project Parameters
Defining & Determining Scope

- Scope definition is a matter of perspective...
- Product scope - Definition? Example?
  - Requires fact-finding, documenting and obtaining approval
- Project scope - Definition? Example?
  - Requires understanding of product scope & project goals
- In both cases what is NOT included is as important as what is included!

Scope Creep
- What causes it?
  - Poorly defined requirements
  - “Wouldn’t it be great if...?”
- What does it cause?
  - Schedule and cost overruns
  - Resource bottlenecks
  - Higher project risk load
  - Dissatisfied stakeholders

Scope Gap
- What causes it?
  - Poorly defined requirements
  - Overconfidence
- What does it cause?
  - Schedule and cost overruns
  - Higher project risk load
  - Dissatisfied stakeholders
  - Severe embarrassment!
Defining & Determining Scope

- Scope Control and Change Management will be one of the topics discussed in Session #2 next week!

“Every composer knows the despair and anguish occasioned by forgetting those ideas which one failed to write down”
Hector Berlioz

Want to Insure Your Project from “Anguish” and “Despair”?

- Create and USE a Work Breakdown Schedule (WBS) for every project
- May be the single most useful project management tool
- WBS should identify all required work... no more and no less
- Level of detail in WBS should reflect complexity or importance of project
...and a WBS in Outline Format...

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<td>Activity B</td>
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<td>Testing</td>
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<td>4.3</td>
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<td>Activity C</td>
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</tbody>
</table>

Benefits of Using a WBS...

- Identifies ALL items of work
- Permits creation of “fragnets” or “chunknets” as management tools
- Expedites “what if” analysis
- Facilitates management of scope change

Guidelines for Building a WBS

1. Each work package should be product-oriented
2. The sum of the “children” must equal the “parent”
3. No parent should have an “only child”
4. Each work package must be assignable as an complete unit
5. The riskier and/or the more complicated the work, the more detail into which it should be decomposed
Group Exercise

- Thanksgiving Day Feast Project WBS
- You are hosting, in your home, a traditional American Thanksgiving Day dinner for 12 friends and family members. Create a WBS for this project that meets the following requirements:
  - Follows all Guidelines on previous slide
  - Uses no more than 6 Second Level (just below the Project Name) branches
  - Contains at least 20 Work Packages (lowest level activities)

Where Are We in the Planning Process?

- We’ve produced an approved Product Scope Description
- We’ve produced an approved Project Scope Description
- We’ve produced a Work Breakdown Structure (WBS)
- Congratulations! We now have a Project Scope Baseline.
  - This is what we will measure scope progress against in status reports
  - This is what needs to be followed (no more and no less) in order to complete the project successfully and as planned!
  - All attempts to depart from this Baseline must be controlled!

“Good fortune is what happens when opportunity meets planning”
Thomas Alva Edison
Estimate Activity Durations, Costs and Resources...How?

- Activities
- Attributes
- Resource needs
- Resource calendars

Input: Activities

Output: Activities

Needs

Estimates

"A great part of the miseries of mankind are brought about by false estimates of the value of things"

Benjamin Franklin

Obtain "Expert Judgment"

- Ask a more experienced colleague!
- Check the database you will start building after this Session!
- Consult publicly available information sources, such as
  - Price Lists
  - BC’s Preferred Suppliers List
  - Industry-Specific Design or Build Standards
  - Professional Association Web Sites
  - …and so forth…
- ITS PMO has much experience estimating duration and is always available to help
Estimating Techniques and Tools

- Apply Analogous Estimating
  - Uses actual data from previous similar projects as basis for producing estimates for current project
  - Need to apply modifications to reflect known differences
  - Example: Project 3 years ago to design similar system for another department took 85 days - *questions that need to be asked?*
  - Method is cheap and quick, but accuracy and reliability can be suspect!
  - Very useful technique - but never lose sight of its limitations!

- Improve accuracy/reliability of previous two techniques by incorporating into Three-Point Estimate Calculations
  - Do not settle for a single-point estimate - things are never that simple!
  - Always ask/look for answers to three questions –
    1. What’s the worst/longest/most expensive it could be?
    2. What’s the best/shortest/least expensive it could be?
    3. What’s most likely?
  - A Three-Point Estimate is the average of the three answers

- VASTLY improve accuracy/reliability of any estimating technique by implementing the PERT Calculation
  - Uses same three data points obtained for the Three-Point Estimate – usually referred to as:
    - Pessimistic (P) – The value based on the worst-case scenario
    - Optimistic (O) – The value based on the best-case scenario
    - Most Likely (ML) – The expected value given likely and realistic conditions
  - Recognizes that ML data point should be weighted more heavily than two extremes of P and O
  - Applies formula for Weighted Average:
    - \( \frac{(O + 4ML + P)}{6} = \text{Duration/Cost Estimate} \)
Estimating Techniques and Tools

- The DRED – Doubled Resource Estimated Duration
  - Based on concept of “Resource Elasticity” – correlation between quantity/quality of resources used and duration of activity
  - Some activities have greater Resource Elasticity than others
    - Examples?
    - Very useful information to have when we need to optimize our schedule!

Tips for Estimating Duration...

- These factors CANNOT be ignored –
  - The timing of review and approval cycles
  - The amount of time required for obtaining approvals
  - The timing of budget cycles
  - The amount of time required for administrative processes such as internal communication and documentation
  - The additional amount of time required for inter-department processes
  - The amount of time required for obtaining human resources if not available internally

Tips for Estimating Duration...

- Never forget that Parkinson’s Law is fully, robustly and enthusiastically operational within the Project Management context –
  - The time needed to complete an activity WILL expand (at a minimum) to the time allotted to it to do so!
Best Practices when Estimating

- The individual responsible for the work must produce an estimate
- Ask for a median estimate, in addition to the usual request for an optimistic, pessimistic and “most likely” estimate
- Assume availability of one complete unit of any required resources
- Activity being estimated should have duration no longer than 1.5 times the project’s reporting period
- Ask for a DRED estimate

Our Next Step Will Be...

THE RESOURCE BATTLE

REQUIREMENTS vs. AVAILABILITY

- Definition of “A Day in the Life of a Project Manager”
- First Step: Determine what is needed to meet your schedule, assuming all resources are available
- Second Step: Adjust schedule to reflect current reality of resource availability (quantity, quality and/or calendar constraints)
REQUIREMENTS vs. AVAILABILITY

- What is NEEDED?
- How much is NEEDED?
- When will it be NEEDED?

REQUIREMENTS vs. AVAILABILITY

- What is NEEDED?
- What is AVAILABLE?
- How much is AVAILABLE?
- How much is NEEDED?
- When will it be AVAILABLE?
- When will it be Unavailable?

Resource Plan – BC Example

<table>
<thead>
<tr>
<th>Name</th>
<th>Project Name</th>
<th>Project Responsibilities</th>
<th>Start Date</th>
<th>End Date</th>
<th>Other Info</th>
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<tbody>
<tr>
<td>Product Owner</td>
<td>Exchange SME (EPM)</td>
<td>Project Manager and lead for the Exchange SME Program to ensure cross-functional and integrated efforts</td>
<td>1/1/2016</td>
<td>12/31/2016</td>
<td>Project Manager &amp; Leadership, Cross-functional / integrating programs</td>
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<td>Product Owner</td>
<td>Exchange SME (EPM)</td>
<td>Business Analyst</td>
<td>2015-01-01</td>
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<td>Project Manager &amp; Leadership, Cross-functional / integrating programs</td>
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<td>2017-01-01</td>
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<td>Project Manager &amp; Leadership, Cross-functional / integrating programs</td>
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<tr>
<td>Product Owner</td>
<td>Exchange SME (EPM)</td>
<td>Business Analyst</td>
<td>2020-01-01</td>
<td>2020-12-31</td>
<td>Project Manager &amp; Leadership, Cross-functional / integrating programs</td>
</tr>
</tbody>
</table>
"We are doing what we can with the resources we have"
Anon (no doubt a project manager)

Summary...

- Good planning is crucial to project success!
- Use a Work Breakdown Structure (WBS) to insure capture of all work necessary to deliver product scope.
- Obtaining quality estimates can make or break a successful project.
- Identify resource bottlenecks and unavailability as soon as possible during project planning process.
- You have excellent resources available here at BC... take advantage of them!

"I have no money, no resources, no hopes. I am the happiest man alive"
Henry Miller, author (NOT a project manager)
One final thought…

“If it isn’t written down, it doesn’t exist”
Pat Armstrong, PMP

Questions?

Group Project Discussions

- Assemble into assigned Groups
- How can today’s topics be applied to your Group Project?
- Here are some examples of questions to ask and explore –
  - If you are the Project Sponsor, how confident are you of the Product Scope?
  - For others, does the Product Scope seem clear enough?
  - Could the Project Scope be improved? Consider the Project’s complexity, risks and team’s level of experience when answering this question
Group Project Discussions

• ...and more examples of questions to ask and explore –
  - Are the Project’s Resource Requirements clear? Is there room for improvement? Consider a Group brainstorm of resource requirements and compare to Project Sponsor’s prior understanding
  - How have the Project’s Duration Estimates been derived? Could they be improved by re-estimating using another technique?

For the Project Sponsor – If possible, bring copies of the Project’s Charter and WBS for the Group to review in Session #2

Next Session...

• Wednesday, March 23rd, 9am
• Groups will meet briefly for update on the Group Project
• Topics to be presented –
  - Sequencing Activities and learning to build a Network Logic Diagram (NLD)
  - Introduce a Calendar and … a Schedule is created!
  - Change Management Control – how and why to implement a Change Management Control Plan
• Groups will again meet briefly for discussion

Thanks for your participation!

Denise M. Guérin, JD, MS–PPM, PMP
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ITS Project Charter

DOCUMENT PURPOSE
The purpose of this document is to present the work plan for the project. This document is a formal agreement with the team that outlines the project management activities. All sections are required unless noted as optional.

1. BUSINESS OVERVIEW
Provide a high level overview of the business need – historical background and summary of what led to the initiation of this project, i.e., issue or opportunity being addressed, department/area involved, organizational impact, expected result, etc. Define project linkage to the ITS Strategic Plan (or other ITS area).

1.1 Business Need

1.2 Linkage to ITS Strategic Plan

<table>
<thead>
<tr>
<th>ITS Strategic Plan - Key Areas</th>
<th>How does this project relate to the Strategic Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning and Teaching</td>
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<tr>
<td>Research</td>
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<tr>
<td>Customer Service</td>
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<td>Administrative Applications</td>
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<td>Security</td>
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<tr>
<td>Infrastructure</td>
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</tbody>
</table>

Additional Consideration

| ITS Operational Efficiency    |                                                  |
| ITS Other (i.e. APR, Audit, compliance, etc.) |                                                  |

2. PROJECT SUMMARY
Summarize what is discussed in the following sections; provide an overview of the project’s technical solution.

3. PROJECT SCOPE
Describe the work to be performed that will produce the expected project outcome: product, service or result. Any changes, additions or deviations should be addressed via the project change request process.

3.1 Included in Scope

3.2 Out of Scope

4. PROJECT ASSUMPTIONS & CONSTRAINTS

4.1 Assumptions
Describe what existing or anticipated work efforts, hardware, software or resource requirements are “assumed” to be available or in place in order to have a successful and on-time completion of the project; assumptions are items typically not controlled by the project team.
4.2 Constraints

*Describe the things that might restrict, limit, or regulate the project; often constraints are not controlled by the project team, i.e., resources, policies, schedules, technologies, etc.*

5. **PROJECT PLANNING**

5.1 Work Breakdown Structure (WBS)

List the high level tasks, activities or phases of the project – from start to finish.

5.2 Milestones

*List the milestones for this project – typically a subset of key WBS items with dates; include target start and end date.*

6. **PROJECT ARTIFACTS**

List all the deliverables that will be produced by the team during the project; both product and project based, i.e. Project Charter, Software Architecture, Functional Specifications, Testing Plan, Project Close-out, etc. Include any relevant technical or supporting artifacts or references (current state diagram, roadmap, vision statement, website/wiki, etc.).

7. **PROJECT ORGANIZATION**

*Define the project team members and their project roles; include sponsor, project manager, project team, key stakeholders, etc.*

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
<th>Resource Name</th>
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<tbody>
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<tr>
<td>Project Financial Manager</td>
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</tbody>
</table>

8. **PROJECT RISK (OPTIONAL)**

*Define the risks associated with this project. Risk Factor refers to an uncertain occurrence that may interfere with the projects goals. It may be related to a product, service, process, resource, cost, or schedule. Risk Rating is the product of the probability of an event times its potential consequences (impact); see rating table in the charter guidelines for additional details.*

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</table>
9. **PROJECT COSTS**

Describe the costs associated with this project. Document the implementation and operating financial data in the tables below. Include funding sources for the current and next three (3) fiscal years.

### 9.1 Estimate of Project Implementation Expenditures and Funding — required for implementation and close out of the project.

#### Estimated Project Expenditures

<table>
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<tr>
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<th>FY__</th>
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<td>80% [ ]</td>
<td>90% [ ]</td>
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</table>

Explanation:

#### Anticipated (proposed) Project Funding Source

<table>
<thead>
<tr>
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Explanation:

### 9.2 Estimate of Operating Expenditures and Funding — required for Operations and Maintenance of the assets/deliverables after project completion.

#### Estimated Operating Expenditures

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<td>This estimate is accurate to:</td>
<td>50% [ ]</td>
<td>60% [ ]</td>
<td>70% [ ]</td>
<td>80% [ ]</td>
<td>90% [ ]</td>
<td></td>
</tr>
</tbody>
</table>

Explanation:
### Anticipated (proposed) Operating Funding Source

<table>
<thead>
<tr>
<th></th>
<th>FY__</th>
<th>FY__</th>
<th>FY__</th>
<th>FY__</th>
<th>Total</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ITS - Operating</strong></td>
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<tr>
<td><strong>Dept - Operating</strong></td>
<td></td>
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<tr>
<td><strong>Other</strong></td>
<td></td>
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<tr>
<td><strong>Total</strong></td>
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</tbody>
</table>

This estimate is accurate to: 50% [ ] 60% [ ] 70% [ ] 80% [ ] 90% [ ]

Explanation:

#### 9.3 Estimate of Cost Savings
- resulting from implementation of this project’s recommended solution (dollars or staff).

#### 9.4 Estimate of additional Support Resources
- resulting from implementation of this project’s recommended solution (staff).

#### 10. Project Management Procedures

**10.1 Communications**
- Describe the types and frequency of communications to stakeholders and the project team.

**10.2 Team Meetings**
- Describe the types and frequency of meetings with stakeholders and the project team.

**10.3 Tracking**
- Describe how the schedule, scope and budget will be tracked and managed.

**10.4 Change Requests**
- Describe how changes to the schedule, scope and budget will be tracked and managed.

#### 11. Project Charter Reviews

<table>
<thead>
<tr>
<th>Review</th>
<th>Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Reviewed department/business requirements with:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2) Completed Architecture Review</td>
<td></td>
<td></td>
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<tr>
<td>Service Center Ticket #:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3) Reviewed ITS financial data with:</td>
<td></td>
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<tr>
<td>4) Prepared by:</td>
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<td></td>
</tr>
</tbody>
</table>

For help with this template, please see the Project Charter Guidelines: [http://www.bc.edu/pmo/templates/](http://www.bc.edu/pmo/templates/)
If you have any additional questions, please contact anyone in the BC ITS PMO: [http://www.bc.edu/pmo/staff-list.html](http://www.bc.edu/pmo/staff-list.html)
## Exchange 2007 Project

**Date:** 4/1/12  
**Project Manager:** Name 1

### Resource Plan

<table>
<thead>
<tr>
<th>Name</th>
<th>Project Role</th>
<th>Project Responsibilities</th>
<th>% of Project time</th>
<th>Project Backup</th>
<th>Start Date on Project</th>
<th>End Date on Project</th>
<th>Other Roles</th>
<th>% of Other time</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name 1</td>
<td>Executive Sponsor</td>
<td>• Provide strategic direction and executive decisions for project</td>
<td></td>
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<tr>
<td>Name 3</td>
<td>Appl &amp; Sys Project Manager</td>
<td>• Manage and lead the Appl &amp; Sys project team</td>
<td>70%</td>
<td>Backup 3</td>
<td>3/1/2012</td>
<td>3/1/2013</td>
<td>Project / Support</td>
<td>30%</td>
<td>115%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Assist with cross-team activities and integration</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Name 4</td>
<td>Exchange calendar migration lead</td>
<td>• Develop, test &amp; support server cal migration tool</td>
<td>60%</td>
<td>Backup 3 &amp; Backup 4</td>
<td>6/1/2012</td>
<td>12/31/2012</td>
<td>Project / Support</td>
<td>10%</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Perform Oracle CampusTime to Exchange migrations</td>
<td></td>
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</tr>
<tr>
<td>Name 5</td>
<td>Exchange Applications Administrator</td>
<td>• Exchange planning</td>
<td>100%</td>
<td>Backup 4</td>
<td>3/1/2012</td>
<td>3/1/2013</td>
<td>Project / Support</td>
<td>10%</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Exchange operations / support</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Name 6</td>
<td>Communications Lead</td>
<td>• Develop &amp; implement communications plan</td>
<td>95%</td>
<td>Backup 5</td>
<td>6/1/2012</td>
<td>4/1/2013</td>
<td>Project / Support</td>
<td>5%</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Liaison w/ Dept Contacts</td>
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</tr>
</tbody>
</table>

### Applications & Systems Team

| Name 3        | Appl & Sys Project Manager             | Project / Support                                                                       |                  |                   |                       |                     |                     |                 |       |
| Name 4        | Exchange calendar migration lead       | Project / Support                                                                       |                  |                   |                       |                     |                     |                 |       |

### User Support Services Team

| Name 6        | Communications Lead                    | Project / Support                                                                       |                  |                   |                       |                     |                     |                 |       |