

**A Guide to Project Management  
for  
Information Technology Projects**

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# Chapter 1

## Introduction

The purpose of this document is to provide an overview of techniques and tips that can be adopted by Project Managers who are primarily tasked with managing a project on behalf of a Service Provider (vendor). The guide should also be useful for Project Managers in general. The document is **not** a traditional guide to project management processes and techniques. The document provides Project Managers with information that can be used during a project to help ensure successful project completion.

To many Project Managers some items may appear to be a statement of "the obvious" and a re-statement of project management basics. However in the midst of the pressures of managing a project it is often the simple basics that can provide the best means of leading to solutions and for developing strategies to move forward.

Project Managers are often responsible for managing a wide variety of project types. The material in this guide applies to all projects. In particular, a project management framework is described in Appendix C which sets out the key tasks and deliverables for the initiation, planning, execution and closeout of a project.

Within this Guide there is often reference to a Project Management Office or PMO. Organizations vary in the way they establish PMOs and the functions the PMO performs. In this document the term PMO refers to an independent team (within the Vendor organization) which assists Project Managers and conducts reviews of deliverables. The term PMO may be substituted with the person or team which may perform a similar function.

The Guide also refers to a Client Relationship Manager. This term is used to represent the person within the Vendor organization responsible for the overall relationship with the Client i.e. Sales, Business Development etc.

# Chapter 2

## Project Management Overview

This section summarizes some fundamentals of managing a project on behalf of a Vendor. The section:

- Describes the role of various personnel during the project lifecycle
- Introduces a Project Management Framework which can be used to underpin the effective delivery of all projects
- Defines some “critical rules” that apply to all projects
- Provides a summary of other project management activities that may be expected from Project Managers.

### 2.1. Project Roles and Responsibilities

Roles of personnel on projects will vary according to the structure of the Vendor organization, the size of a project, the project structure and responsibilities agreed with the Client etc. Some of the more common roles are:

Client Relationship Manager who is a person (or persons) in the Vendor organization responsible for:

- The Sale of a viable solution
- Contract Establishment and Management
- Commercial Management (based on information provided by the Project Manager)
- Client relationship management
- Project Management support for issue resolution and risk mitigation
- Review and management of invoices to Clients.

Commercial Manager who is a person in the Vendor organization responsible for:

- Contract Review and Sign-off
- Statement of Work Review and Sign-off
- Scope Change Request (SCR) authorisation (usually above a given limit)

Project Manager who is the person assigned to manage the project on behalf of the Vendor and is responsible for:

- Delivery to the prescribed contract terms and conditions
- Project cost tracking and reporting
- Project team management
- Development and execution of project plans
- Quality management
- Change management
- Communication and escalation of project issues and risks to the Vendor Senior Management and/or the Project Management Office
- Communication and escalation of commercial issues and risks to the Vendor Client Relationship Manager
- Trigger and review of invoices based on the payment schedule in the Contract

Project Management Office (PMO):

- A PMO will function differently in different organizations
- The PMO may assist with Project establishment and registration
- May conduct Reviews of the quality of project deliverables
- May conduct reviews of project and commercial risk
- May provide additional project support e.g. estimation, project management assistance, processes, techniques and access to standards and tools.

Architecture Team:

The Vendor will usually have a dedicated Technical Architecture team for:

- Provision of Technical consultancy and Architecture of solutions.
- Conduct Technical Design Reviews

## 2.2. Project Management Framework

The Project Management Framework (Appendix C) shows an effective delivery of projects by defining the key project management activities and deliverables for each project phase.

It covers the following generic project phases:

- Initiation,
- Planning,
- Execution, and
- Closeout.

Within each of these phases, the framework identifies the key project management tasks which should be undertaken by a project manager in order to adequately discharge his/her

responsibilities for scope, quality, time, cost, resources, communication, risk and administration.

The Project Management Framework takes the form of a matrix and is shown in Appendix C.

As well as showing the tasks that a project manager should undertake, the Framework also shows, at the bottom, the various deliverables which, in most cases, are considered mandatory.

It should be noted that the Project Management Framework may be used in discussions with the Vendor's clients to show how projects are managed to a high standard.

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## 2.3. The “Critical Rules” for Successful Project Management

There are five “critical rules” which apply to the management of Vendor managed projects and they all relate to “communication”. Equally these same rules can be applied to any project.

**Critical Rule No. 1** - Maintain an effective relationship with the Client through ongoing, frequent and positive communication. Whilst in the most difficult situations you should be firm with the Client, it is essential to be sensitive to the Client environment and to maintain a balanced approach to Client related issues and politics. Involvement in the latter is to be avoided.

**Critical Rule No. 2** – Constantly talk to your project team. You should keep the project team informed of progress and provide opportunities for the team for two-way communication and for their issues to be listened to and dealt with.

**Critical Rule No. 3** - Highlight problems and issues when they arise and escalate unresolved problems and issues to the appropriate people, e.g. the Client, Client Relationship Manager and/or PMO. Wave the red flag as soon as a major issue arises that puts either the project or your company's reputation at risk.

**Critical Rule No. 4** - Ask for help. Most vendor organizations have the resources to assist with resolution of problems. Asking for help is not a signal of failure but a pro-active step to resolve a project, or commercial issue.

**Critical Rule No. 5** – Always follow the project management principles and practice embodied in this document and implement appropriate quality processes, taking responsibility for the quality of deliverables and, where applicable, supporting any quality accreditation process. Respond positively to requests for information from senior management and the Project Management Office.

## 2.4. Project Management Fundamentals

Following are the practices usually expected to be adopted by Project Managers. These practices apply to fixed price **and** time and materials projects i.e. whenever the Vendor is committed to a project outcome. Appendix B provides a summary of the vigilance required for many of the items listed below.

### 2.4.1. Team Communication

Effective communication with the project team is key to project success. Project Managers should keep the project team informed with project progress, milestone targets, forthcoming changes and other relevant project information. This should be done through regular team meetings which must also provide opportunities for team members to raise issues, ask questions etc. Particular care must be taken with orientation of new project team members to ensure that they quickly understand what the Client is trying to achieve, the project scope, processes and what is expected of them. Team members should be encouraged to provide weekly status reports for review and discussion.

### 2.4.2. Project Planning

A Project Management Plan (PMP) is usually expected for all projects and the plan should be reviewed and signed off by the Client, Project Management Office and the Client Relationship Manager. The PMP is expected to be updated and re-issued whenever there is a major variation to the project i.e. major scope change and/or major schedule change.

The PMP is expected to include a project plan with an appropriate work breakdown that includes all project milestones and deliverables. The project plan must have a baseline established for tracking purposes.

The PMP should also include the Acceptance Criteria i.e. a clear statement of what the Client expects the Vendor to deliver and the basis upon which delivery will be accepted.

### 2.4.3. Risk Management

Risk Management including the establishment and maintenance of a Risk Management Plan is expected for all projects. Risk Management is covered specifically in Chapter 4 of this document.

### 2.4.4. Change and Scope Management

Change Management is critical. While scope management is essential, change is not always related to scope e.g. schedule change can result due to Client delays. It is imperative that the Project Manager clearly understands the scope and boundaries of the project and this is clearly documented in the PMP. Establishment and management of a Change Register is essential. System Change Requests should be used to document and obtain approval for Change. Where Client delays occur, i.e. where the Client is not meeting their obligations, details should be documented and presented to the Client and escalated to the Client Relationship Manager.

### 2.4.5. Issue Management

It is expected that an Issue Register is established and maintained, which as a minimum contains the following for each issue raised for the project:

- who raised the issue,
- the date raised,
- a description of the issue and
- who is nominated as responsible for issue resolution.

Formal issue review meetings should be held weekly.

### 2.4.6. Resource Management

The Project Manager may also have a responsibility for line management of staff assigned to the project. Thus the Project Manager must monitor the performance of each staff member and take appropriate action if this is not satisfactory. The Project Manager may also be expected to conduct and/or contribute to formal staff appraisals and provide career guidance as part of that process.