

Project Management Ready Reckoner

Project Initiation

- A problem statement has been written for the project.
- The project mission has been communicated to all participants.
- Risks have been identified and contingencies developed when possible.
- The ultimate purpose of the project is understood by all team members.
- Clear definition(s) of project performance requirements exist.
- Adequate criteria exist for measuring achievement of performance targets.
- The work breakdown structure has been developed to levels sufficient to permit estimates of cost, time, and resource requirements at desired accuracy.
- The Work Breakdown Structure (WBS) has been reviewed with
 - Client
 - Contributors
 - Senior management.
- Schedule milestones have been established with planned reviews.
- A task-level schedule has been developed against the WBS in network form.
- The critical path has been identified.
- The critical path allows the required end date to be met.
- The critical path has been examined to determine if it is realistic.
- A Gantt chart has been developed to be used as a working tool.
- Resource allocation has been checked to ensure that no one is overloaded.
- Resources are not allocated at more than 80% productivity.
- Resource conflicts with other projects have been eliminated or resolved.
- The control system has been designed.
- Measures of progress have been established.
- People who must implement the project plan participated in preparing it.
- The plan is at the right level of detail (neither too much nor too little).
- Estimates are based on recorded data for similar tasks when possible.
- Padding of estimates has been done aboveboard.
- Padding is acceptable to management.
- The project plan has been reviewed in a sign-off meeting.
- The project notebook has been signed off by all stakeholders.
- Concerns raised in the sign-off meeting have been addressed to the satisfaction of everyone.

- The plan contains the following:
 - Problem statement
 - Mission statement
 - Project strategy
 - Project objectives
 - Statement of project scope
 - List of deliverables and other contractual requirements
 - End-item specifications to be met
 - A work breakdown structure
 - Both milestone and task-level schedules
 - Resource requirements
 - Control system, including change control procedures
 - Major contributors in the form of a linear responsibility chart
 - Risk analysis with contingencies

- Resource allocations include deductions for vacations, holidays, sick leave, and so on.
- Cost estimates include travel and living expenses as required.
- Costs for project security are included as appropriate.
- Plans include time for reviews, meetings, approvals, and so on.
- All physical facilities are expected to be available.
- Testing facilities are adequate.
- Steps have been taken to ensure availability of new hires as required.
- All project team members are qualified for their work.
- Any required training of team members has been budgeted and provided for.
- Any political problems that could affect this project have been identified and can be handled.
- Arrangements have been made to promote free and open communication among all members of the team.
- Members have been collocated as necessary to facilitate communication. When physical collocation is not possible, *virtual* collocation has been arranged.
- Vendors have been required to submit their own project plans to ensure that all deliveries can be met.
- Boundaries have been pre-established for change control.
- The system has provided that all project revisions be distributed to all appropriate individuals/departments/parties.
- Critical ratios have been established to aid project monitoring.
- A system is in place to revise the project budget both upward and downward when appropriate.
- All team members have personal plans for conducting their part of the project work.
- Variance limits have been established for all contributors.
- Bonus/penalty arrangements have been applied to vendors as needed.
- Critical future events have been evaluated for project impact.
- Resource usage has been smoothed as much as possible.
- The initial plan does not require significant overtime to meet initial schedule dates.
- All deliverables (schedules, reports, etc.) have been identified for each milestone.
- Performance specs have been written and agreed upon by all stakeholders.
- Government regulations (and others) have been identified and cited in the project plan.
- The *real* customer has been consulted in order to pin down requirements.
- A project termination procedure has been developed.
- Team members have been convinced of the value of the project goals.
- Project planning has been based on reviews of previous records for similar programs.
- Unique physical resources (such as test equipment) have been entered into the schedule so bottlenecks can be spotted.
- Required resources that do not yet exist have been identified as risks to project success.
- Roles and responsibilities of each team member have been clearly defined.
- Procedures for doing work have been developed by participants and approved by managers.
- Tasks with durations greater than four to six weeks have been subdivided to avoid back-end loading.
- Parallel critical paths have been eliminated when possible.
- Network diagrams have been checked for logic violations.
- Functional managers in matrix projects have resource-loading diagrams to support their ability to staff projects.
- Projects that span long periods have been budgeted to account for inflation.
- Exit criteria have been established to define completion of each project phase.

Project Execution

- Meetings are scheduled on a regular basis to review progress.
- Estimates of work remaining are not just linear projections—unless those can be justified.
- Causes of delays and other problems have been explained in progress reports and documented in the project notebook.
- Impact of scope changes has been explained to stakeholders and approved.
- Impact of unexpected resource shortages has been computed and explained.
- Meetings have been scheduled for the project team to look at improving its work processes.
- Transfer or termination of a team member has been coordinated with his or her replacement.
- When coordination is impossible, the predecessor has left written instructions for his or her successor.
- Progress reports show "red flags" for situations that are expected to have serious impact on project performance.
- All hours worked on a project are tracked back to the project, including nonpaid overtime hours.
- Competition is kept to a minimum within the project team.
- Corrective action for off-target tasks has been developed and approved.
- Progress reports are distributed in appropriate increments.
- A climate of open discussion and inquiry exists in the project team.
- Team members are encouraged to provide "early warnings" about developing problems.
- The project manager keeps *all* team members as fully informed as possible.
- Consensus decisions are made when appropriate, but not *every* time a decision is required.
- A structured problem-solving approach is employed.
- Functional managers are kept informed of changes that may impact them.
- When no contingency exists for a risky task, precautions are taken to minimize the risk.
- Critical path activities are managed so that they complete *at least* on time, and earlier if possible.
- Tasks with float are completed at the earliest times possible. Float is reserved to handle unforeseen problems.
- Deliverables are used as milestone measures.
- Actual project costs compare well with planned costs.
- Personnel problems (absenteeism, turnover, etc.) are addressed in a positive way, rather than being ignored.
- Morale in the team seems to be good.
- Change procedures are being followed.
- The customer is involved and aware of project status.
- Upper management is aware of project status.
- Testing has been assigned to an independent test group for objectivity.
- Technical standards (for design, coding, etc.) are being followed.
- The documentation is complete, understandable, and accurate, as certified by an independent auditor.
- Primary deliverables are of satisfactory quality.
- There is a documented change procedure for the project.
- Provision is made for handling requests for clarification and interpretation of existing documents.
- Change requests are approved by the appropriate parties, with complete visibility by the project manager.
- All change requests are evaluated for project impact, and stakeholders are informed of the impact before a change is approved.
- Resources allocated to the project are changed as necessary to accommodate project changes.

- All changes are documented and stored in the project notebook.

Project Closure

- A date is set for a post project review meeting
- Senior managers and project team are invited
- The project team is debriefed at the meeting
- Results are checked against original plan
- Budget, quality requirements and deadline meeting are checked
- A list of unfinished tasks is made
- Final project report is made and shared it with all concerned
- All involved in the project are informed about its closedown
- Personal thanks notes are written to project contributors