The Simplified Project Management Process

~ By Kevin Archbold

One of the challenges of explaining project management to people who are unfamiliar with the approach is that descriptions are often either so high-level as to be meaningless, or so detailed that they are overwhelming. Over the years, I have come to use a model as a framework for introducing and discussing project management tools and techniques. It can be used as the basis for a five-minute explanation of what is involved in project management, but also as an outline for more detailed discussions. (The actual model can be found on the Key Consulting website under free templates and info.)

A brief description of each step follows:

**Assemble Team**

The project planning team will be assembled, including appropriate representation from customers/clients, and sometimes subcontractors and vendors. Initial roles and responsibilities will be defined.

**Deliverables:** Initial project setup documentation.

**Define Project Objective**

With the project team in place, the overall project purpose will be verified, and detailed project objectives developed. A phase-exit review will be conducted to ensure that the project is ready to move into the next phase, which is planning.

**Deliverables:** Project charter, phase-exit review checklist.

**Define Project Scope**

An appropriately detailed Work Breakdown Structure (WBS) will be developed to ensure the project scope is properly agreed to and understood by all stakeholders. This also allows the complete project to be split into appropriate sub-projects and/or phases.

**Deliverables:** Project work breakdown structure.

**Construct an Initial Plan**

Once tasks of an appropriate level have been identified in the WBS, they will be organised by the project team into logical network diagrams, with estimated durations. This allows the project manager to predict when activities will be complete, assess the feasibility of target dates, and identify the critical path for the project.
Deliverables: Initial work plan.

Add Resources, Costs, Risks, etc.

Certain project resources may be defined as critical resources. In particular, the project manager may suspect that key project staff may be faced with too much work. If so, estimated resource usage information can be added to the project plan to allow resource forecasting. Cost is obviously also critically important, and expenditures can be added to the plan to create estimated cash-flow requirements. Risk management can also be utilised on projects to provide a framework to better manage events that occur beyond the control of the project team.

Deliverables: Resource availability and commitment profiles, risk identification and control strategies, cash-flow forecasts.

Obtain Stakeholder Buy-in

To ensure the project is implemented as smoothly as possible, with the support of the involved parties, it will be necessary to review the initial plans with all the major project stakeholders and to solicit buy-in from each one. A phase-exit review will be conducted to ensure that the project is ready to move into the next phase, which is control.

Deliverables: Approved final plan, phase-exit review checklist.

Publish the Plan

Once the plans are agreed to, they must be effectively communicated to all stakeholders. This can be done in hard copy or via electronic media, depending on the resources available. On most projects, a communications plan will be developed, and distribution of the plans will follow the guidelines laid out in the communications plan.

Deliverables: Plan published to all stakeholders.

Collect Progress Information

On a regular basis, the project manager will collect progress information that has been reported by the project team. This will allow the compilation of progress reports, such as:

- Activities completed within the past two weeks
- Activities forecast for the next two weeks with a focus on activities on the critical path
- Funds expended vs. fund expenditure forecast
- Prioritised issues report

Metrics can also be developed to measure project progress in other ways, such as earned value, or activity float statistics. If the project manager reviews the progress data and concludes that the project is complete, a phase-exit review will be completed to confirm that all the objectives have been met before moving into the final closure phase.

Deliverables: Set of progress reports, a set of exception reports, metrics report, (phase-exit review checklist).
Analyse Current Status

By analysing the progress information received, the project manager will be able to augment the above reports with information about which areas of the project are of concern and where problems are likely to occur in the future. This allows managers to focus on the important/critical areas of the project.

**Deliverables:** Project evaluation report(s).

Adjust the Plan, and Manage Project Change

Based on the analysis, and with the support of the project team, the project manager will make plan adjustments to help reduce risks, accommodate scope changes, or to compensate for activities that have not occurred on schedule. Once this has happened, the plan will re-published, and the cycle repeated until the project is complete.

**Deliverables:** Change request forms, updated plan.

Close Project

When the objectives of the project have been achieved, the project manager will close down the project. This will involve some financial closure tasks, as well as archiving of the project materials. A lessons-learned document will be developed to benefit future projects, and if possible, a project team celebration will be held.

**Deliverables:** Final project report including lessons learned.

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