

Project management playbook



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Project Status Report:

- Project status Reports are meant to give time-to-time updates on the progress of the project.
- Project Status Reports could be daily , weekly , monthly or quarterly.

Determine Project Status Report to Manage Progress

This slide provides information regarding project status report that caters project progress under specific duration by tracking key phases, key risks, benefits, etc.

Program Name	Project A	Sponsor	Linda Brent	Priority	High	Strategic Driver	Add text here	Finish Date	04/11/2021
Program Mgr.	Sam Mathews	Complexity	High	Costs	\$100,000	Phase	Phase 1	Report Date	15/04/2022

Overall Status	Current Status	Previous Status	Costs	Benefits	Milestones	Resources	Issues	Risks
G	G	A	G	G	G	A	G	R

Key Phases / Milestones	Start Date	Finish Date	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7
Requirements	Nov'21	Dec'21	Requirements						
Design	Dec'21	Dec'21		Design					
Implementation	Dec'21	Jan'22			Implementation				
Testing	Jan'22	Feb'22				Testing			
Deployment	Feb'22	Mar'22					Deployment		
Maintenance	Mar'22	Apr'22							Maintenance

Program Scope / Impacted Stakeholders

- Develop product to handle sales process
- Training to sales team for product usage

Program Current Status

Project is On Track with prepared schedule

Key Risks & Issues

- Risk 1 - Consistent product delivery
- Risk 2 - On time product delivery

Key Achievements

- Develop product to handle sales process
- Training to sales team for product usage

Next Steps / CSF's

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Next Steps / CSF's

- Revenue Gain 20%
- Cost Savings 12%

PMO Checks

- Program aligned with business objectives **G**
- All stakeholders identified & engaged **A**
- Well defined scope **R**
- Requirements are documented & signed off **A**
- Project has realistic schedule **G**
- Dependencies documented & communicated **A**
- All changes evaluated for impact **G**
- Development of business readiness plan **R**

Project Status

- Amber**
One or more project aspects are at risk – time, scope, cost
- Red**
Significant issues. Issues can be escalated based on impact
- Green**
Project is progressing in accordance to plan

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PMO Chart:

- It is the tool used to define the development approach and delineates stakeholder management expectations for the new organization.
- PMO chart is created and approved by the Steering committee , sets the direction and parameters for implementation.

Addressing Project Management Office Charter

This slide provides information regarding project management office charter in terms of purpose, mission of PMO, and objectives of PMO.



- Purpose**
XYZ Co. Project Management Office is a dedicated function developed for specific purpose of assisting firm projects and programs across all lines of business
- Mission of PMO**
 - o Assist projects to successful conclusion
 - o Ensure consistent project management

Objectives of PMO

- Successful end to end project delivery
- Prepare project management maturity across firm
- Mentor and guide project team to ensure project management best practices follow up
- Full implementation of project portfolio management system that will assist strategic planning, project integration, essential resources allocation and project reporting
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Project portfolio management :

- Portfolio management is the selection, prioritization and monitoring of an organization's programs and projects.
- According to its strategic objectives and performances.

Managing Several Project Portfolio for Initiation (1/2)

This slide provides information regarding the project portfolio management for managing various projects in terms of managing schedule, budget, resources, etc.

Project Name	Priority	Status	Resources	Schedule	Budget	Value	Risk	Project Owner	Project Manager
Project A	High	●	Sufficient	At Risk	Over Budget	High Value	Medium Risk	Tom Sullivan	Jay Cooper
Project B	Medium	●	Borderline	On Track	Under Budget	Medium Value	Low Risk	Jeff Ride	Chris Miles
Project C	Low	●	Inadequate	On Track	Over Budget	Low Value	High Risk	Karla Venn	Debrah Sheen
Project D	High	●	Sufficient	At Risk	Under Budget	High Value	Medium Risk	Debrah Sheen	Miz Oliver
Project E	Medium	●	Borderline	At Risk	Over Budget	Medium Value	Low Risk	Miz Oliver	Jay Cooper
Project F	Low	●	Inadequate	On Track	Under Budget	Low Value	High Risk	Tom Sullivan	Chris Miles
Project G	High	●	Sufficient	On Track	Over Budget	High Value	Medium Risk	Jeff Ride	Debrah Sheen
Project H	Medium	●	Borderline	At Risk	Under Budget	Medium Value	Low Risk	Karla Venn	Miz Oliver

Project Status ● Delayed ● Potential Delays ● Apt Progress

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Risk Management :


- Risk management is the process of identifying, assessing and controlling financial, legal, strategic and security risks to an organization's capital and earnings.
- Avoidance , retention,spreading ,Loss prevention and reduction ,Transfer are the 5 basic techniques of risk management.

Risk Management Plan to Handle Key Project Concerns


This slide provides information regarding risk management plan to detect and manage risk for successful project completion by limiting uncertainties associated with project.


Project Name

Project A


Project Manager

Sam Mathews


Report Date

15 – Apr – 2022

ID	Date Raised	Risk Description	Project Impact	Current Status	Risk Impact	Likelihood	Severity	Risk Area	Escalation Required (Y/N)?	Risk Response	Expected Resolution Date	Contingency Plan	Final Status
A	Dec-21	Limited project resources	Project delay High project cost	Open	High	2	1	Yes	Yes	Resource allocation	03 - Dec - 2021	Add text here	Closed
B	Jan-22	Schedule is delayed due to strategic test overruns	Increased project duration with project delay	Pending	Medium	2	3	Yes	No	Prior planning to project timeline	10 - Jan - 2022	Add text here	Open
C	Mar-21	Add text here	Add text here	Pending	Low	4	5	Yes	Yes	Add text here	05 - Feb - 2022	Add text here	Closed
D	Jul-22	Add text here	Add text here	Rejected	High	5	2	Yes	No	Add text here	06 - Mar - 2022	Add text here	Open

Likelihood and Severity Status 5 – Most Likely, 4 – Likely, 3 – Neutral, 2 – Unlikely, 1 – Most Unlikely

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FAQs

What are the contents of PMO charter?

- Purpose
- Vision
- Mission
- And Functions of PMO.
- It further states the PMO's sponsors and primary stakeholders , the services that it offers, the staffing and necessary support structures for the delivery of the same.

What are the major sections of PMO charter ?

- The overview
- The scope

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- The approximate schedule
- An outline of required resources
- Budget estimated

What are the objectives of status report ?

- To escalate risk and issues with stakeholders .
- To get visibility for the accomplishments of the project team.

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What are the three types of project portfolio ?

Combe and Githens (1999) identify three general types of project portfolios:

- Value creating
- Operational
- Compliance

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What are the 4 types of project portfolio management ?

- Active portfolio Management
- Passive portfolio management
- Discretory portfolio Management
- Non-discretory portfolio Management

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