

## CHAPTER 1

# Initiating the Project Plan

**S**o, you want to be a project manager—or maybe you already are one. Either way, you continually end up doing projects as part of your job—nothing really big, just a bunch of small-to-medium-sized projects that eat up your days. You're most likely very good at organizing, getting things done, and managing multiple projects simultaneously. But you're always feeling a little behind the eight ball, frustrated by the time and energy you expend on these projects. This book will help you set up a planning methodology for small-to-medium-sized projects that will give you back time and energy while you continue to get your projects done on time and on budget. In this chapter, I'll describe the process for project initiating and introduce the project plan document. Project initiating is the steps you go through to get approval to even get started. This is when you first use resources to begin planning the project. But first, I'll define the types of projects—both small and large—you can work on and how their sizes can put constraints on planning.

### **Small vs. Large Projects**

How do you decide whether you have a small or large project? You could easily say this book project is a small project. It's not just physically small, but it's *financially* small and on a short schedule whereas a retrofit of the San Francisco–Oakland Bay Bridge is a *large* project both physically and financially, and it's on a really long schedule. In this section, I'll discuss some of the differences between how Project Managers (PMs) manage small projects vs. large projects so you can determine which type of projects you may have been assigned.

## 2 Planning

In many ways, managing large projects is easier than managing small projects. For large projects, the PM is usually managing one major project at a time. It's easy to escalate and resolve issues on larger projects because the project is visible and many people understand the importance of the outcome. The team is usually dedicated to the project, and often bonuses are tied to the project's success. Large projects usually have formal procedures and reports for project management, including a charter; a cost-benefit analysis; a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis; and a dedicated PM. With large projects, it is easier to dedicate the team's attention to brainstorming the project's risks and requirements, and your organization may even provide you with standard corporate benchmarks to help you plan.

In large projects, things are more defined than in small ones. Small projects seem to start with set due dates that don't allow for project initiating and planning time, which results in project management processes that combine Initiating and Planning. What this means to a PM is that while you are collecting information and getting formal approval to initiate the project, you are also planning how you will complete it. Resource assignment and documentation tend to start in a more casual way than they would in a large project. Large projects may start with documentation such as work orders, Statements of Work (SOW), sales orders, contract addendums, or service orders. These documents are usually standard company forms that define the requirements, deliverables, and estimates for size and delivery dates for the requested work. Project management is usually not as rigorous for small projects, and the expected turnaround is usually rather short.

Small projects are also temporary, are unique, and have a start and end date that meets the formal definition of a project. However, they're often overlooked as projects requiring project management discipline. This is because they often look *repeatable* because they have requirements that are similar to other projects. Projects that fall into this category are new products, new customer implementations, customer conversions, software releases, and annual events. It's critical that you jump on the project early and initiate project planning, or else the days will slip by, the end dates don't move, and you'll have to manage the project in chaos.

PMs who manage small projects are responsible for juggling and managing many projects in various stages of completion. The sponsor and team members are also involved in many projects. The sponsor may be a manager who is responsible for all projects of a certain type. Consequently, priorities may conflict, especially if the team is also responsible for production support or corrective maintenance. The corporate value of these projects is usually cumulative, so it's difficult to see the impact of missed schedules and budget overruns until year's end. Surprisingly, the attitude from management can often be, "Planning is a waste of time since we do these kinds of projects all the time." But this shouldn't be the case, and it's the job of the PM to reinforce the discipline pertaining to planning for the organization. After all, time spent planning up front will assure you a better chance of project success because the stakeholders and project team are all on the same page as far as the project goals and so on. It can potentially save you time in rework later as well as prevent the requirements from taking on a life of their own. How do you do that? Let's start with project initiating.

## **Initiating a Project**

The beginning of a project is when an organization decides to do something new, such as create a product, a building, or an operation. This could be triggered by a market need, a customer request, or a government regulation. Who, what, where, when, how, and how much are just the beginning questions to ask about the project. Before you start planning the project, you need to complete the initiating, the first process group of the project life cycle. In the initiating phase of the project, the PM begins to collect answers to those and many more questions prior to the project kickoff. Let's discuss initiating in more detail.

## **Understanding the Initiating Process Group**

In the *initiating* process group, someone (an individual in the organization, a group in an organization, or the organization itself) decides to do a project. How a project is initiated depends on the size of the project and your

corporate process. Often there isn't a clear line of demarcation between the initiating and planning process groups. What's clear, however, is that a project needs to have a sponsor, some level of project definition, an approval to start, and a PM.

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**NOTE** If you need further explanation or a refresher on the standard project management processes, refer to Appendix A of this book.

All projects should have a *sponsor*: the person who ultimately has decision-making authority and who also has the responsibility over the project budget and the ability to assign resources. The sponsor can make your job easy or difficult depending on whether you can partner with them in managing the project or whether you have to spar with them on every step of the way. A strong, supportive sponsor can increase the credibility of your project and grant you authority over it.

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**TIP** As we all know, it isn't always possible to partner with your project sponsor. Sometimes the two of you will clash. As the PM, you'll need to bend to the sponsor's style to keep the project on track, which may involve, as we say in the business, "flexibility."

Sometimes you don't have a single sponsor; you have a *sponsor committee* or a group of managers responsible for prioritizing and managing the budgets of many projects. Sponsor committees add unnecessary complexity to every project because these committees can turn a simple decision into a major event.

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**TIP** If you have any influence, keep away from a sponsor committee situation and recruit a specific sponsor for your project.

How do PMs get assigned to projects? They may come to you in a variety of ways, both formal and informal. A formal project assignment may be a meeting with the sponsor and/or your boss where the sponsor explains

the scope and expectations of the project and reviews all the project documentation. The project might also be assigned to you in an informal manner, such as through a conversation in a hallway or over lunch in the cafeteria. It all depends on how your organization operates.

The problem with a casual method of assignment is that you don't know your authority or responsibility over the project, and you can't be sure that the assignment is real. The main issue with these handoffs is that they often occur after project initiating, which is in your best interest as PM to be directly involved in. Should you jump on the project during planning based on a casual conversation? Probably not. If in doubt, go to your boss and verify the assignment.

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**TIP** I prefer to be identified as the PM early in the project so that I can be involved during initiating. Unfortunately, the PM selection is considered a deliverable of initiating, so oftentimes a PM doesn't enter the picture until the planning phase. My advice is to do your best to avoid being assigned to a project after initiating. Just know that sometimes you can't avoid it.

## Preparing for Planning

During initiating of a small project, you need to get into the habit of planning projects within a day or two of your assignment, because you won't have the time or opportunity to delve into the planning of the projects once the projects have begun.

Before you start planning a project, take a few minutes for what I call "project manager reflection time." Give yourself some time to think through what you know and expect about the project before the rest of the project noise starts. The first time you do this, it may take a couple of hours. But after you practice and fine-tune this ability, it will take mere minutes. During this time, you'll find that you know more about the project than you thought you knew. I suspect after this exercise, you'll also have more confidence in your PM skills.

During reflection time, consider the resources your project requires, which departments will be involved, and the time it will take to complete the project, as well as the time your organization has allotted you to complete it. Consider also the Subject Matter Experts (SMEs) you may need to call on to help you with the project. And most important, consider how you'll communicate with your project team members.

You'll want to ask yourself dozens of questions. In the following sections, I present some sample questions to start your project reflection. I've also included the questions in a template format in Appendix B. As you practice this discipline and increase project management experience, you'll begin to collect your own questions. Even though this reflection time is for your benefit, as well as for your project's benefit, you'll want to keep the answers to these questions to yourself, as you wouldn't want to upset team members, stakeholders, or clients with your candor. The intent is that you may identify problems you may not want to share, such as potential sabotage or personal problems of a team member that you know may impact the project.

**Process history** Is there documentation from a similar project that you can use as a base? If you know of or have another similar project, immediately retrieve the documentation from the other project. Even if the other project was a disaster, start there. Expend your energy to improve the process and documentation rather than to create a new process. If there's no process in place, think about other processes your organization has in place and how you or your colleagues have achieved success in the past. I'll discuss options for creating processes in Chapter 7, "Defining the Quality Plan."

**Project sponsor** Consider your relationship with the project sponsor and whether you've worked well together in the past. If you've worked with this sponsor before, identify their strengths and weaknesses. Is the sponsor committed to this project, or is this just another task dumped on her plate? Does your sponsor have leverage in case you need additional resources or a clarification of priorities? Do you have a sponsor committee that will make the decisions? If you don't have a sponsor, do

you need one, or do you have authority to make the necessary decisions? If you need a sponsor, whom do you want, and what is your plan to recruit one?

**Resources** Resources include labor, equipment, and materials. List what you know you'll need and what you suspect you'll need to complete the project. Is your team going to be spread across the globe? How will you have meetings? Do you need to arrange for a telephone conference line (bridgeline)? Is your team in one room or located in different departments in the building? Do you have access to videoconference equipment? Do you need to think about issues that may arise because of contracts with the government or a changing regulatory environment?

**Project team** Perhaps the team is already predetermined, or perhaps you can lobby to draft the team yourself. Consider whom you'd like to have as your project team as well as the members' strengths and weaknesses. What influence or authority will you have over the group? Have you worked with the team before? If you haven't worked with this team before, is there anyone you know well enough to get insight into how they operate? Is there a critical person required for the project? Do you have the luxury to include cross-training in preparation for the project? Cross-training is a valuable long-term strategy to relieve the stress of having only one person in the organization with the requisite skills.

Does the identified team have the skills to successfully complete the project? If not, how will you get them trained? How many hours do you think your team will need to spend on the project? Will you need several people for a week or two? Will you need one person full-time for several months with four people working part-time? I'll discuss the project team in more detail in Chapter 4, "Drafting the Dream Team."

**Budget** For small projects the expectation is often that the PM will get the project done within the predefined budget established by management. The PM is responsible to try to meet that expectation *and* to let management know if that isn't possible. Consider whether you need to modify the budget or request more funding. Do you know of other

projects running under budget? These projects are often measured under one cost center budget.

**Project deliverables** Here's where you'll consider project deliverables such as documentation, schedule, training, and new employees. Do you need to fit this into a standard production schedule? Can the project be done in phases? Does this project deliverable have to be perfect? Is there zero tolerance for customer impact? Do you need professional printing for collateral? Does the product have to be multilingual? Do you need to develop an easy-to-understand interface? You're probably thinking now, "Well, of course I want a perfect, professional easy-to-use product." But when and if the project is in trouble, can you sacrifice some of these items for one of the others? For example, in a website launch, you may be able to release the product on time and release an upgrade a month later with the improvements and still meet client expectations.

**Project duration** You'll go through a more formal time-estimating effort when you get to Chapter 6, "Creating the Schedule." However, during "PM reflection time," you should consider how long the project will take. Remember that the duration must also include planning, coding, internal testing, and user acceptance. Your estimate of time should include time for clients to make decisions about the project. The fiscal year of the firm can make the project more complicated from a budget viewpoint. Many firms are rigid about budgeted money being spent in the correct time frame, but projects often overlap fiscal time frames. The PM may need to spend more time with the financial stakeholders to make sure everyone understands the needs of the project. Don't let yourself get caught in the "I have plenty of time to start the project" trap. Before you know, it will be October, and you'll have to rush the project and risk not meeting the expectations.

**PM commitment** How many hours of your time do you think you'll need to spend on this project? Review your current commitments, and don't forget to include standing meetings, performance reviews, annual budget creation, current projects, and future commitments. Do you

have enough time and energy to commit to a successful completion of this project?

**Stakeholders** *Stakeholders* are all the people who have either a positive or a negative impact on your project. This is a chance to list who may have a negative impact (or positive impact) on the project and why (make sure no one else sees this list!). Evaluating the stakeholder support level is a critical step, as it will help you to determine the level of communication and documentation you need. For example, if stakeholders' trust level in you is high, you need to document only the issues that further the progress of the project. If you think stakeholders don't trust you, you may need to document every discussion and decision in detail. The trust level on the team will influence how much time you'll need to schedule for documentation for the project.

**Communication** What are your communication preferences: e-mail, phone, pager, or paper? Identify your preferences, but understand that others on your team may have other preferences. The trick is to organize your communication so that you get the most information to the right people in the best format.

The most formal method of communication for a PM is through documentation. This seems like a small thing. But developing your documentation process is critical for your communication. What's your preference: notebooks or electronic folders? Whatever your choice, you need to start documenting and communicating right now.

**Risk** What risks do you know of right now? Are you working with international team members who speak different languages? Do you have potential personality conflicts on the team? Will the product delivery match the annual budget? And finally, is this a pet project of the Chief Executive Officer (CEO), and what impact will that have on the project?

**Research** What additional information do you need to manage this project? You'll continue to define this in more detail later, but for now, think about global issues, such as how current technology trends and

the market climate for your product may affect the research you'll do throughout the project.

**PM instinct** What does your gut feeling tell you? Is this going to be a tough project? Or is everything in place to make this a relatively successful project? Does this project support the corporate directives, or are there people who are against this project? Is your team going to be helpful and enthusiastic, or did they have another solution in mind? What if you have a project where many of the operations people wanted another vendor? It should be clear that a close relationship with those decision makers will be critical to the success of the project. You may not be able to turn down a project that you suspect may fail, but you can use this time to identify risks and develop mitigation and contingency strategies.

Now it's time to convert your reflection time thinking into a project plan.

### Introducing the Project Plan

One of the most overlooked documents for any project is the *project plan*. This is the document that describes how the project will be managed. The perfect project would allow for time for the project team to create, review, and approve the project plan. As I mentioned earlier, management often considers the project plan an extravagance for smaller projects. But as PM, you know that a project plan is the foundation of all successful projects. Without a project plan you're running the risk that you'll have to manage your project based on intuition and squeaky-wheel issue resolution.

The following are three important justifications for having a project plan:

**Team communication** The primary reason you'll publish your project plan is as a communication tool for the team and stakeholders. Most people expect that you'll have meetings and they will be a waste of time. Or they assume you'll have some documentation that will appear randomly throughout the project. For example, you might have a schedule that no one reads or understands. And they may assume

you'll single-handedly track and resolve issues. Your project plan will document how and when you'll perform these duties and what the participant's role is in these functions. After all, many minds are better than one, and team effort will produce far better results.

**Stakeholder confidence** The second reason to write a project plan is to build stakeholder confidence. Having a written document to explain how you'll manage the project reinforces your commitment to the project. It will also enable the stakeholders to understand and agree to a plan that will enable them to commit support and resources. Incorporating the stakeholders in the issue resolution escalation process will reinforce their role and responsibilities on your project.

**The 80-20 rule** The final reason to use a project plan is to document the repeatable processes of your project. Your status reports, issue identification and resolution, status meetings, schedule status updates, and sponsor updates are all repeatable processes in a project. The goal with your project plan is to get the repeatable processes to occur without intervention 80 percent of the time. How can you do that? You have to get your team to agree to notify you of issues, status, new risks, and schedule updates. When you can accomplish this level of teamwork, then you can use your skills to negotiate and resolve the remaining 20 percent. This is a better use of your time and expertise. We've all seen managers who have to be involved with every decision. The result is that their issue resolution turnaround becomes the root cause of project schedule overruns.

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**TIP** For my projects, I have a standard project plan template that matches my management style, communication preferences, and corporate procedures. I merely have to tweak a few sections, and my plan is ready.

Now that you've graduated from initiating into project planning, let's discuss how to draft the project plan.

## Drafting the Project Plan

Once you've contemplated the various elements of your plan during your reflection time, you're ready to actually draft the project plan. You may even find yourself using a lot of your reflection time comments in the plan itself. A team-drafted project plan will enable you to document the project management process you'll use throughout the project. This process works best if the PM has a rough draft of the document prior to meeting with the team. (I've found that project team members would rather redline documents than create them, so it's worth checking in with your team members on this point. With many small projects, time runs short, and my standard template often becomes the project plan by default.)

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**NOTE** You'll recall from your project management training that all process groups of project management are *iterative*. Projects don't flow from one process group to another in a clear-cut linear manner; instead, responsibilities hop back and forth through the project process groups. For example, you may need to revisit the planning phase if you're given a new set of client expectations or a larger budget in the execution phase.

Your skeleton project plan will include many of the following items, which I'll discuss throughout this book:

**Goals and business objectives** In this section of the project plan, you'll list the goals and business objectives and clearly define these terms. You'll include such projections as increased revenue, improved efficiency or quality, and decreased expense. Make sure the goals align with corporate objectives and are Specific, Measurable, Agreed to, Realistic, and Time-bound (SMART) goals. If you have a project that doesn't match a corporate objective, you run the risk of having the project questioned or canceled midway through the project.

**Scope and scope management** The *scope* of your project includes all the work required and only the work required to complete the project

successfully. In this section of the project plan, you'll identify what needs to be accomplished to meet the expectations of the stakeholders. If you complete more than what's defined in the scope, then you're wasting resources. Establishing project scope and continually managing it is required for you to keep boundaries on the project.

**Change management plan** In this section of your project plan, you'll define how you'll identify and manage changes to scope and requirements. Change management is vital for determining which items need to be completed as part of this project. Changes can be any alteration of direction or additional requirements that are identified during the completion of the project. Usually these kinds of changes have an impact on resources, schedules, and budget and must be identified and prioritized quickly. You'll want to ask yourself, "Is there a standing committee to review, prioritize, and approve changes for the project, or is that the responsibility of the sponsor?"

**Project measurements** You need to define how you will measure project success. You have many ways to measure a project. I recommend following a standard set of benchmarks to measure the successful outcome of a project: time, cost, quality, scope, and customer satisfaction. Your goal should be to complete a project on the date promised, within the budget allocated, and with minimum defects that delivers a product that meets the defined requirements and satisfies customer expectations. As they say, you get what you measure. Defining the measurement criteria will define your project success.

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**NOTE** I'll discuss goals and objectives, scope, change management, and project measurements in further detail in Chapter 2, "Defining Business Objectives, Goals, Scope, and Requirements."

**Risk response plan** In this portion of your project plan, you'll include a description of how you'll identify and manage risks for the project. What are project risks? They are any potential problem that can impact

the outcome of a project. Identification of the risk early in a project exponentially improves the chance of success.

**Stakeholder management plan** Here you'll include a description of the project team members, their roles in the project, and how you will manage them. Some issues that will have an effect on the stakeholder management plan include whether you work in a *matrixed organization*, where people are temporarily assigned to a project, and whether the *functional managers*, the people who are the formal supervisors of your team members, are in favor of the project. Functional managers are the managers your team members report to for raises and non-project-related direction.

**Communication plan** We all know that a PM will spend up to 90 percent of her time communicating to the stakeholders about the project, so the communications plan is the most critical part of the project plan. One of the first communications you need to have with your team is the description of how you'll distribute project information. Will you communicate with the team, stakeholders, and the sponsor in a formal or informal manner? Will you do this via e-mail or phone? How will you escalate issues? How will you get quick resolution of issues?

**Issue management plan** What is an *issue*? It can be a question, a problem, a potential risk, or a to-do. Often issues are too small an item to be tracked on a schedule. In the issues management plan, you'll describe how you'll track, manage, and closeout these kinds of concerns. Issues need to be raised, assigned, and closed out continually during the project. Make sure your issue management plan also includes a process to have closed issues tested during the quality-testing portion of your project.

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**NOTE** I'll discuss the stakeholder management plan, the communication plan, and the issues management plan in more detail in Chapter 4.

**Budget estimates** In the budget estimates portion of the project plan, you'll include a description of how you'll review and validate the budget for the project. The budget is usually one of the main project measurement criteria for any project. I'll discuss project budgets in more detail in Chapter 5, "Finalizing Estimates and Budgets."

**Schedule and milestones** Your project plan will also include a description of how you'll distribute and communicate the schedule, critical path, milestones, and their status through the schedule and milestones section. Meeting your due date is the second most used criteria for project success. Management likes this measurement because it's easy to determine whether the project is on track and whether you can meet your date. In Chapter 6, "Creating the Schedule," I'll discuss scheduling and milestones further.

**Quality management plan** The quality management plan will include a description of how you plan to manage quality for the project. This is where you'll incorporate the corporate quality policies and procedures into your project, including processes for benchmarking, testing, and auditing. I'll review quality methods in Chapter 7, "Defining the Quality Plan."

**Procurement management plan** Procurement management includes contract administration and equipment/service purchasing. Both of these functions can have long lead times, which reinforces the need to define your plan and your procurement deliverables early in the project. Dragging your feet to initiate a requisition or meet with your legal team could make the difference in whether you'll meet your project date. In Chapter 8, "Defining the Procurement Management Plan," I'll review strategies to identify, schedule, and manage procurement deliverables.

**Approvals and project kickoff** Obtaining project plan approvals are necessary to finalize the scope, commit resources, and get buy-in for the project. Once those approvals are obtained, you're ready for the team kickoff to begin work on the project. In Chapter 9, "Revealing the Plan," we'll discuss strategies and techniques for the project kickoff.

I recommend you develop a standard project plan template that you're familiar with, which you can continue to use when you're assigned new projects. Throughout our continued discussions of the intricacies and importance of properly planning a project, I'll discuss the elements of the project plan. Before I go into a deeper discussion of project objective and scope, I'll cover how project initiating and the PM reflection fit into the greater scheme of project management.

### **PROJECT LIFE CYCLE VS. PRODUCT LIFE CYCLE**

After passing the Project Management Professional (PMP) exam, I was determined and enthusiastic to incorporate what I learned into my project processes. I also have a penchant to combine processes where possible. So I tried to map the product life-cycle documents into the project life cycle. I spent hours trying to figure out where the design documents fit into the planning process group. I expressed my frustration during lunch with my fellow PMs.

The result was one of the epiphanies of my PM career. A wise mentor explained the difference between a *project life cycle* and a *product life cycle* and why you need both. The product life cycle is how you do the work. This will include documenting your analysis, coding, printing, building, testing, and implementing. The project life cycle is the life cycle of the project, which includes the five process groups of a project. The project life cycle includes how you plan and manage the project, as well as the project reviews and closeout. The crossover emphasis for this book is that you document your plan for how you'll manage how the team performs the work per the product life cycle.

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## Case Study

Patricia is the new engineering manager for Volte Corporation, a company that provides software and hardware solutions for a patented voice-recognition product. Her primary responsibility is to manage five software and five hardware engineers. She is known for her organizational skills and “get it done” attitude. One morning on the way to get coffee she meets up with Laurie, her boss’s boss. The two discuss a potential client implementation that has an expected due date eight months from today. Laurie asks if Patricia has time to look at the draft of the SOW and provide her with feedback by the end of the day.

Patricia refreshes her coffee while thinking about the opportunity. Back at the office, she calls her boss, Bob, to ask about the project and the SOW review she was just asked to provide.

Bob says, “Oh yeah, we were discussing this in last week’s department meeting, and your name came up as someone who could handle the conversion. We need this client implementation as a strategic hook into the market. I think you’d do a great job. I know your schedule is pretty tight right now, but I think this would be a great addition to your resume.

“There are a couple of things I think you should know about the project. First of all, a similar project was done two years ago with moderate success. As I recall, the client was Brown Enterprises. The PM who was in charge of that project left the company shortly after the project’s completion. I’m sure there’s documentation, somewhere. Maybe you could talk to Jeff in Document Control to find out where to start looking.

“The company you’ll be converting this time around is a previous client who left our services because of conflicts with our old management team and a very bad conversion of their top customers. In fact, several of their own customers left them because of that conversion. Some of the original Brown Enterprises management team is still with Brown Enterprises and will be working with you on this project. I don’t think they have confidence in our ability to pull this off.

“Sorry I hadn’t gotten around to talking to you about it. Do you think you could squeeze it into your commitments?”

Patricia agrees to think about it and get back to him at the end of the day with her answer. She walks back to her office, looks at her schedule, and sees that she has a couple of hours to review the project. She finds a quiet location and pulls out her standard project reflection questions. She reviews and completes the following as her preliminary project review:

**Process history** Yes. Volte Corporation does have a process to follow for this project but only for projects greater than 5000 hours. Work orders initiate internal work, and SOWs are used for initiating external projects. I need to find and collect the project documentation for the previous conversion implementation.

**Project sponsor** Yes. The sponsor for this project will be Laurie. She is well connected and well respected. This project will be a foundation to grow the market share of the company, which is one of the top three corporate goals, so this will be an incentive for Laurie to be committed to the success of the project. I’ve worked with her before, and we communicate easily.

**Resources** I have the current software, a workspace, and a project team available. I need hardware for implementation.

**Project team** Jay and Mike: two software engineers. Christina, John, and Jodi: three hardware engineers. Also needed: standing legal, purchasing, technical writing, and publishing members.

**Budget** No. This project will be similar to the previous project. I’ll need to find last project costs as a place to start. I will still need an itemized budget for this project with all the resources/contractors/materials listed.

**Expectations** Declared: Client expects eight-month schedule. Client expects zero client impact as a result of the conversion.

Undeclared: I need to talk to the sales person to identify any other promises for this contract.

**Project duration** Eight-month implementation and conversion turn-around. Hardware has eight-week turnaround, once ordered. Training needs to be held one week before launch. New contracts typically take twelve weeks to execute.

**PM commitment** I currently have six hours of standing meetings per week. Each meeting requires thirty minutes prep time, for a total of nine hours. I am averaging eight to twelve hours per week for project management for two other projects over the next eight weeks. This project will require at least eight hours per week for the first several weeks. That leaves about five hours per week to manage my team.

**Stakeholders** The stakeholders for this project include the sponsor, the project team, the attorneys, purchasing, all the functional managers, and the client. The client has worked with the previous vendor for 10 years. The operations manager wanted to contract with the other vendor and is sure you can't perform or convert. I need to build a strategy to improve trust with the client.

**Communication** The company has a standard format for collecting the project documents in folders on the Local Area Network (LAN). My preference for communications is e-mail; however, Laurie prefers phone and voicemail. The client team will include members across several states in several time zones. I'll need to make sure I have access to a telephone conference line for meetings and issue resolution.

**Risk** Depending on the kickoff, this project may be implemented in December. I need to get everyone's vacation schedules. I also need to get reservations early for the implementation team to travel to the client's site.

**Research** Is there a better technology that should be used for this conversion that wasn't used in the last conversion? Is there technology that would make implementation and configuration quicker and cheaper? I need to look into this.

**PM instinct** The sponsor, Laurie, will be helpful. I know most of the team and have the authority to select the rest of the team. This project has enough priority and visibility to be able to get additional resources as necessary. The vendor trust issue will be an obstacle. I'll need to work on the relationship with the client and make sure I have good escalation procedures. Maybe we could have the project kick off on-site with the client. I need to make sure I order the hardware early to avoid the end-of-the-year rush. My time commitments are pretty tight for the next few weeks. But this project will be worth my time and efforts.

After Patricia reflects on her initial project review, she decides she is up for the challenge. She sends an e-mail to Bob and Laurie to let them know she can work this into her schedule. She begins reviewing the statement of work and schedules a time to go over those comments with Laurie the next morning.